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October 20, 1986

Advertising Age

Crain's International Newspaper of Marketing. In Two Sections. Section 1.

FAST FOODS ON GRILL

Entire category 'in play'; Mac plans nutrition ads

By SCOTT HUME
and PATRICIA WINTERS

The extended sales slump in the $45 billion fast-food industry has turned up the pressure, leading to rapid-fire ad campaign flip-flops, major product strategy shifts and frequent turnover in executive suites.

These strains have damaged almost all existing client-agency relationships, giving every fast-food account the appearance at least of "being in play."

McDonald's reportedly has demanded "breakthrough" ads from Leo Burnett USA. Burger King last year almost pulled its account from J. Walter Thompson USA, and now has a new top management. Kentucky Fried Chicken changed hands, with PepsiCo acquiring it for $840 million to give the soft-drink industry still more clout in the fast-food business. Pepsi's favorite agency is BBDO. Y&R just picked up its first business from Burger King parent Pillsbury, coming out of BBDO. And the stage is set for perhaps the greatest game of fast-food agency musical chairs ever. This in an industry that spent more than $1 billion last year in television

(Continued on Page 110)

Agencies for top 10 fast-food chains

The restaurant industry's top 10 advertisers spent more than $850 million last year, and 1986 spending is expected to approach $1 billion, making restaurant accounts among the sought-after. Should any of the major chains open its account to competition, a round of agency "musical chairs" could follow. *Source: Advertising Age.*

Chain	Agency of record	1985 Media Billings
McDonald's	Leo Burnett USA, Chicago	$317.8 million
Burger King (Pillsbury)	J. Walter Thompson USA, New York	156.0 million
Wendy's	DFS Dorland Worldwide, New York	86.6 million
Kentucky Fried Chicken (PepsiCo)	Young & Rubicam, New York	76.4 million
Pizza Hut (PepsiCo)	Chiat/Day, Los Angeles	64.5 million
Taco Bell (PepsiCo)	Tracy-Locke, Dallas	39.3 million
Hardee's	Ogilvy & Mather, New York	33.6 million
Red Lobster (General Mills)	Grey Advertising, New York	28.3 million
Long John Silver's (Jerrico)	Foote, Cone & Belding, Chicago	26.6 million
Denny's	Foote, Cone & Belding, Los Angeles	23.2 million

Tribune may buy 'N.Y. Post'

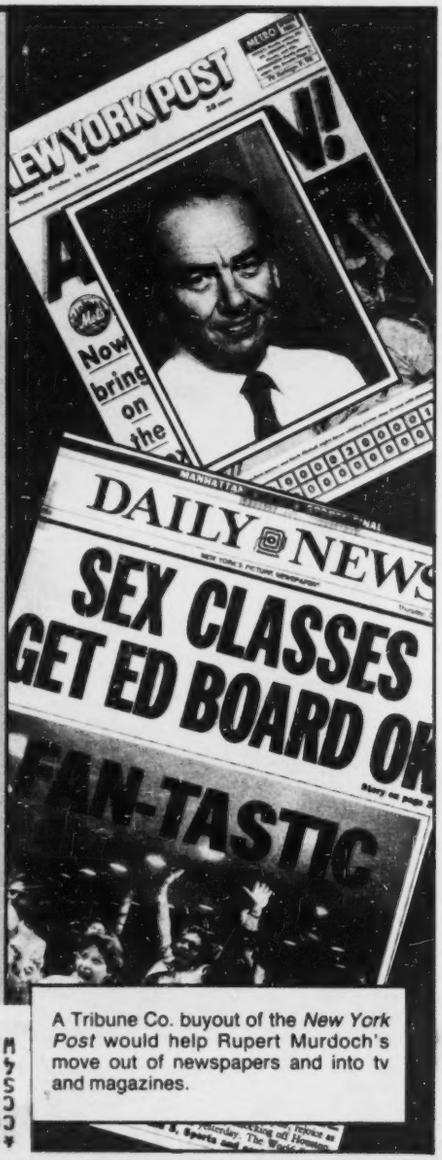
By WILLIAM F. GLOEDE

NEW YORK—Newspaper publishing circles were buzzing last week with reports that the Tribune Co., parent of the struggling *Daily News* here, has offered to buy the assets of Rupert Murdoch's *New York Post* for an estimated $65 million to $85 million.

And in another deal indicative of Mr. Murdoch's continuing move out of newspapers into tv and magazines, he has apparently agreed to sell his News America Syndicate to Hearst Corp.'s King Features Syndicate.

The reports of the Tribune offer were roundly denied by top executives at the *Post* and the *Daily News*. Roger Wood, executive editor at the *Post*, said "the rumor has no basis," while *Daily News* president-

(Continued on Page 108)



A Tribune Co. buyout of the *New York Post* would help Rupert Murdoch's move out of newspapers and into tv and magazines.

P&G weighs possibility of agency buy

By LAURIE FREEMAN

CINCINNATI—Procter & Gamble says it has considered acquiring an agency in order to take its $1.3 billion budget in-house.

P&G chairman-ceo John Smale last week told shareholders the company has "considered buying an ad agency from time to time." Mr. Smale would not say which agency or agencies were under consideration or whether P&G actively is seeking an acquisition at this time.

Also left open was the possibility that P&G could take in-house at least the media buying for its brands as RJR Nabisco, Anheuser-Busch and other major advertisers recently have done.

P&G already handles its network tv buying in-house.

Mr. Smale did say operating a full-service agency is not something the company is eager to do, telling shareholders he still believes P&G is better off using separate independent agencies to serve its numerous accounts.

"In Cincinnati we set the strategic direction. Writing copy is a creative undertaking and we feel better with specialists [handling that]." He said while some companies use in-house agencies, "very few stick with these agencies for very long because they find they don't get the same creativity they do with outside agencies."

Behind Mr. Smale's statement is the series of agency merger-related events that led P&G to reassign more than $150 million worth of billings so far this year. And for a company that is used to longevity and a top-dog role with its agencies, this kind of movement is dis-

(Continued on Page 108)

Last Minute News

Mikey comes back to Life

CHICAGO—Quaker Oats today breaks two new network tv spots for its Life cereal, featuring 18-year-old John Gilchrist, who played "Mikey" in a 1971 spot. Quaker has been challenging consumers to identify Mikey out of several dozen teen agers pictured on boxes of the cereal (AA, June 16). BBDO Worldwide created the new campaign, though the brand has been shifted to Jordan, Manning, Case, Taylor & McGrath, New York (AA, Aug. 21).

'Toothies' reach a Crest

CINCINNATI—Procter & Gamble and Coleco, West Hartford, Conn., are teaming up for an $8 million tv, print and sweepstakes campaign, breaking this week. The effort features new Cabbage Patch Kids "Toothies"

(Continued on Page 8)

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Highlights

P&G has pondered agency purchase 1
Procter & Gamble says it has considered acquiring an agency in order to take its $1.3 billion budget in-house. P&G chairman-ceo John Smale last week told shareholders the company has "considered buying an ad agency from time to time." He would not say which agency or agencies were under consideration or whether P&G actively is seeking an acquisition at this time.

Birch and Nielsen negotiate 3
Birch Radio and A.C. Nielsen Co. are expected to conclude a "cooperation" agreement that would escalate the current war in the radio research business. The fighting until now has pitted Arbitron Ratings Co.'s radio research unit against Birch Radio.

Rivalry fuels air-fare war 4
The simmering rivalry between corporate raiders Carl Icahn and Frank Lorenzo is set to ignite again this winter in a bargain air-fare battle pitting Mr. Icahn's Trans World Airlines against Mr. Lorenzo's Texas Air empire.

Quaker ventures into frozen territory 24
Quaker Oats once again has surprised its competitors with a new product in the wholesome-snack market, testing a line of frozen-fruit ices under the Great Arctic Fruit Co. brand. Industry observers had expected Quaker to introduce a dried-fruit product.

Baltimore papers 'Post' challenge 34
Now that crosstown rival *News-American* has been buried, the Baltimore *Sun* newspapers are loading their slingshots to go after that Goliath to the south, the *Washington Post*. The *Sun's* tactics include more local coverage, direct mailings and special sections aimed at attracting readers and advertisers in the fast-growing and affluent suburbs.

AD PAC passes out funds 40
The American Advertising Federation, through its AD PAC political action committee, has doled out a few hundred dollars here and there to "friendly" legislators facing reelection this Nov. 4.

Nieman joins McCann-Erickson stable 46
After a year of turbulence following the fiasco with new Coke and the fast arrival/departure of Curvin O'Rielly as exec vp-executive creative director at McCann-Erickson, the agency has moved to recapture some creative stability by hiring John Nieman Jr.

FEATURES

Circuits open route for Parcels 52
Usually, a package designer sits at a drafting table and starts sketching ideas with Magic Markers. If he then decides the package should be yellow or the logo bigger, it's back to the drawing board. Not so at Dixon & Parcels, which Roy Parcels, president, says is one of the country's first comprehensive computer-aided package design studios.

INTERNATIONAL

Maxwell aims for U.S. expansion 66
Czech-born Robert Maxwell, who owns British Printing & Communication Corp. (the largest U.K. national newspaper group), 70% of Britain's cable tv system, St. Paul, Minn.-based trade journal publisher Webb Co. and two soccer teams, has his eye set on expanding U.S. holdings. "We're interested in the whole gamut—printing, publishing and communications," says Mr. Maxwell, hinting at other, soon-to-be-closed U.S. deals.

OTHER NEWS

Miller Brewing's decision to test-market a "wheat-brewed" beer under the Dakota name may signify more than an attempt to ease its sales slump. By segmenting further the stagnant beer market, Miller may be traveling the only growth path open to domestic brewers. Page 6.

The continued evolution of the $14.9 billion sporting goods market toward "soft goods" was apparent at this month's National Sporting Goods Assn. Sports Expo, dominated by footwear and apparel marketers. Page 30.

Like the Unsinkable Molly Brown, Captain Kangaroo "ain't down yet." In the seasons ahead, Bob Keeshan may become even more visible—not only on tv but on store shelves—than he was in his CBS-TV heyday. Page 73.

Outside publisher Larry Burke recalls the day in 1976 when he "noticed there was no magazine for people who had the same interests as I did and defined the outdoors the way I did." The glossy, crisply designed monthly in January will increase its rate base to 250,000 from 240,000. Page 92.

Walter Weir, whose 1970 retirement ended an influential 42-year career in advertising, can make a unique claim: A campaign he wrote 40 years ago led a $150 million company to lure him back into the business—to write its first-ever ad campaign and to usher it into the agency business. Page 102.

SPECIAL REPORT

California agencies may take a different approach to work than those in other parts of the country, but the state's laid-back image doesn't apply to advertising. The state is crowded with agencies competing for too few accounts. A few are responsible for some much admired innovations.

Austrian, James exit Showtime

By VERNE GAY

NEW YORK—Two top executives of Showtime/The Movie Channel have resigned, signaling continued turmoil in parent Viacom Networks Group and an uncertain future for the ailing pay tv channel.

Neil Austrian, Showtime chairman-ceo and the former president-ceo of Doyle Dane Bernbach Group, said he would leave by the end of the year to pursue opportunities in advertising or investment banking.

Watson (Jay) James, senior vp-strategic planning, has also left the company. Mr. James was recruited by Mr. Austrian two years ago when he was a cable specialist in the media department at DDB.

Both resignations come just six weeks after Robert Pittman resigned as president-ceo of MTV Networks, another Viacom subsidiary.

No replacements for Messrs. James and Austrian were named and it was unclear whether Mr. James' position would

(Continued on Page 108)

Beef, pork gird for meaty battle

By JANET MEYERS

Cybill Shepherd is moonlighting, too.

The sexy star of ABC-TV's "Moonlighting" series already is an ad spokeswoman for L'Oreal cosmetics, and the beef industry hopes to land her for a tv spot that will do for beef what co-star Bruce Willis has done for Seagram's Golden Wine Cooler.

The pork industry, locked in a battle against beef and chicken, bristles at the idea.

Ad stakes in the meat wars are big—$25 million for beef, up to $10 million for pork—and the new products they'll hype are being readied for market: Exotic pork stir-fry and new, branded, pricier cuts of beef and pork.

The National Pork Producers Council, Des Moines, last week signed Bozell, Jacobs, Kenyon & Eckhardt, Omaha, to handle its $5 million-to-$10 million account after spending only $2 million this past year with Fletcher/Mayo, Kansas City.

At the same time, the National Live Stock & Meat Board, Chicago, was close to signing Ms. Shepherd and James Garner as stars of its $25 million beef-boosting campaign, "Real food for real people," via Ketchum Advertising/San Francisco. Other stars considered for the campaign were rocker Tina Turner and Oscar winner Sally Field.

Beef producers hope the celebrities will add punch to their first full-scale network tv campaign, slated to break by Feb. 1, said Tom

(Continued on Page 108)

West Coast News

BBDO assembles creative team for Apple

LOS ANGELES—BBDO Worldwide named Ken Segall, formerly associate creative director at Lord, Geller, Federico & Einstein, New York, senior art director and Ivan Horvath, former vp-associate creative director, N W Ayer, Los Angeles, senior copywriter to work under creative director Steve Hayden on the Apple Computer business. At BBDO, San Francisco, Brian Quennell, former vp-associate creative director on the account at Scali, McCabe, Sloves, Toronto, becomes associate creative director on Apple and Vittel.

BELMONT, CAL.—**Fortune Systems**, marketer of multiuser computer systems, selected Blake Agency, San Francisco, replacing Hayes-Rothwell, Santa Clara. Fortune will introduce a computer system called Formula later this month.

LOS ANGELES—Cohen/Johnson named **Tom Ruffino**, formerly senior vp-management representative, Rubin, Postaer & Associates, as account group director on Jack in the Box, a new post. Separately, Sandra Tuttle, former producer at the company's previous agency, HCM, moves to Della Femina, Travisano & Partners as vp-director of broadcast production, replacing Shannon Silverman, who left.

SEATTLE—**First Interstate** Bank of Washington invited incumbent Stimpson & Associates to pitch its $1.5 million account, along with Borders Perrin & Norrander, Ehrig & Associates, Elgin Syferd, Livingston & Co.,

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CURRENTS

Michael's 2nd coming heralded by new film album, fashions, toys

Michael Jackson, who's been next-to-invisible during the past year, seems to be enjoying something of a revival.

He's the star of "Captain EO," that 17-minute, $20 million 3-D space fantasy now playing at Eastman Kodak's pavilions at

Walt Disney Productions

Disneyland and Walt Disney World—a film that's said to cost more per minute than any other. It features two Jackson songs, was produced by George Lucas and directed by Francis Ford Coppola, with characters that seem to be a cross between those in "Star Wars" and those in "Aliens."

(NBC-TV aired a special marking the release of the heavily publicized short film just before the new season's "premiere week." Its Nielsen ratings showed a disappointing 10.3 rating and a 19 share, to rank 50th among 59 programs shown that week.)

Jackson's next record album is now expected around January from CBS Records' Epic label. The big question is whether the project, originally targeted for last summer, then this fall, will be strong enough to top the giant success of "Thriller." Still, as music veterans point out, one strong cut that could be released as a single would make the difference.

There also are Michael Jackson fashions and a line of plush animal dolls, Michael's Pets, inspired by the singer's own menagerie. View-Master Ideal Group, New York, will market the line in the U.S. and Canada "early next year," says Arnold Thaler, the toy maker's chairman.

So, in the future, we will not only hear the reclusive Jackson, but also see him, wear his fashions and play with his toys.

James P. Forkan

Writer cans the jokes, which now bring $6.95, applause thrown in free

As a speechwriter for Congressmen and corporations, Seattle's Jim Cook had grown to regard the blue pencil as his personal enemy: "I was always told to pull the jokes out."

Then one day while in the bathtub musing on his career, Cook decided that "rather than having to fight [editing] all the time, I'd put my humor in the can."

Hence, "Canned Speech." Cook filled pop-top cans with short speeches for every occasion: 40th birthday, nervous groom, the graduate, etc. Cook also offers an Executive Six-Pack that includes a keynote address, raise request and retirement speech.

"How does it feel to turn 40? Let's put it this way. As I look at myself in the mirror, I'm reminded of the great pianist Oscar Levant who once said: 'Beneath this flabby exterior lies an enormous lack of character.' "

In this vein, Cook's speeches go on to quote everyone from Miss Piggy to Bertrand Russell and, no doubt, Jim Cook himself. His keynote address, for instance, rings with frightening familiarity:

"Yes, these are difficult times. But together we must go forward. I know you'll understand what I mean when I say the future is now, the past is prologue, the bar is open. So let's get off our high horses and develop our game plan for leveling the playing field."

Available nationally through Spencer Gifts and the catalog Giggletree!, each speech retails for $6.95 and includes a boutonniere and an "Applause" sign. And that about sums it up. Any questions? No questions. Well, it's been a great pleasure being here. Thank you—and go knock 'em dead! ("Applause.")

Jim Cook's canned speeches come complete with jokes.

Lenore Skenazy

Watch your Manners before tying the knot

Miss Manners, whose syndicated columns tell us which fork to use and what's the right thing to wear at garden parties, is branching out into video.

The etiquette columnist, a.k.a. Judith Martin, recently launched the first in a planned series of videocassettes to teach the civilized approach to life. "Miss Manners on Weddings" unfolds against a backdrop of cucumber sandwiches and wedding cake.

Her hair swooped up in a bun (as is appropriate for married ladies of a certain age), Miss Manners spends 50 minutes counseling a set of rag-tag relatives, friends and bridal participants on the correct way to get through that most taxing of life's events: The wedding.

Some nuggets from Miss Manners' wealth of irony-tinged advice: Don't snigger about whether the bride should wear white. "The white dress," she counsels the couple who've just received their wedding invitation, "doesn't tell you about the condition of the body inside."

Kartes Video Communications, Indianapolis, owned by Scripps Howard (which also owns Miss Manners' syndicator, United Media), produced the $19.95 video.

C.B. Wismar, Kartes' executive producer, expects to distribute 20,000 to 30,000 copies of the video in book and video stores. After all, Wismar says, there are 3.5 million weddings a year, and "Miss Manners on Weddings" makes the perfect shower gift.

The video will be advertised in *Bride* and *Modern Bride* as "the ultimate wedding video from America's foremost authority on such things."

Wismar says child-rearing may be the subject of the next Miss Manners video. That seems likely because at the end of the first video, which uses actors from Washington's Arena Stage theater, Samantha Applegum and Dirk Dearborn have just married.

Miss Manners' new video, "On Weddings," is the (first and) last tape on marriage etiquette.

"There's talk of a miniseries," Martin says. "We could take them through to the funeral."

Janet Meyers

The hot seats

"Currents" takes a look at the latest concert scene with a listing of the top 10 concert draws for the past month.

Headliner, supporting acts	Venue, city, dates	Total attendance (capacity), No. of shows	Promoter or sponsors	Gross ticket sales
1. Genesis	The Spectrum, Philadelphia, Sept. 24-27	73,230 (18,308) 4 sellouts	Electric Factory, Michelob	$1,214,773
2. ZZ Top, Honeymoon Suite	Reunion Arena, Dallas Aug. 30-Sept. 2	62,113 (15,528) 4 sellouts	Beaver Prods.,	1,086,978
3. Bob Seger & the Silver Bullet Band, Fabulous T-Birds	Pine Knob Theatre, Clarkston, Mich., Aug. 28-Sept. 3	70,000 (14,000) 5 sellouts	Nederlander, Pine Knob	1,000,000
4. Genesis	Joe Louis Arena, Detroit, Sept. 18-20	54,168 (18,056) 3 sellouts	Belkin Prods., Michelob	54,168
5. Bill Cosby	Chicago Theatre, Chicago, Sept. 19-21	20,742 (3,457) 6 shows	In-house, Shepardson	850,404
6. Neil Diamond	Shoreline Amphitheatre, Mountain View, Cal., Sept. 16-18	41,963 (15,000) 3 shows	Bill Graham Presents	818,390
7. Neil Diamond,	San Diego Arena, San Diego Sept. 22-24	44,100 (14,700) 3 shows	Avalon Attractions, Eric Chandler, Ltd.	744,900
8. Neil Diamond,	Tacoma Dome, Tacoma, Wash., Sept. 9-10	44,700 (25,000) 2 shows	Avalon Attractions, Eric Chandler Ltd.	744,100
9. Bob Seger & the Silver Bullet Band, Fabulous T-Birds	Market Square Arena, Indianapolis, Sept. 6-8	45,059 (15,019) 3 sellouts	Sunshine Promos.	716,828
10. Elton John	Pine Knob Theatre, Clarkston, Mich., August 17, 18, 25	48,000 (14,000) 3 sellouts	Nederlander, Continental Airlines	604,520

Source: *Amusement Business*

HIT LIST

Currents compiles the nation's current entertainment favorites below.

Movies

1. **Crocodile Dundee** - Paramount (1 wk.)
2. **Stand by Me** - Columbia
3. **Blue Velvet** - DEG
4. **Name of the Rose** - 20th Century-Fox
5. **Nothing in Common** - Tri-Star

Provided Oct. 14 by Variety

Books

1. **His Way,** Kitty Kelley, Bantam (1 wk. at No. 1)
2. **It,** Stephen King, Viking
3. **Red Storm Rising,** Tom Clancy, Putnam
4. **Rotation Diet,** Martin Katahan, Norton
5. **Fatherhood,** Bill Cosby, Doubleday

Provided Oct. 14 by B. Dalton

Network tv

1. **Cosby Show** - NBC (77 wks. at No. 1)
2. **Family Ties** - NBC
3. **Cheers** - NBC
4. **Murder, She Wrote** - CBS
5. **Movie: "Last Frontier," Pt. 2 - CBS**

A.C. Nielsen rankings Oct. 6-Oct. 12

Videocassettesko.

1. **Fonda's New Workout** - KLHV (26 wks.)
2. **Sound of Music** - CBS-Fox
3. **Alien** - CBS-Fox
4. **Kathy Smith's Body Basics** - JCI Video
5. **Alice in Wonderland** - Disney

Reprinted from Oct. 11 Billboard

Record albums

1. **Top Gun Soundtrack,** MCA (5 weeks)
2. **Forel,** Huey Lewis and the News, Chrysalis
3. **Dancing on the Ceiling,** Lionel Ritchie, Motown
4. **Slippery When Wet,** Bon Jovi, Mercury
5. **Raising Hell,** Run-D.M.C., Profile

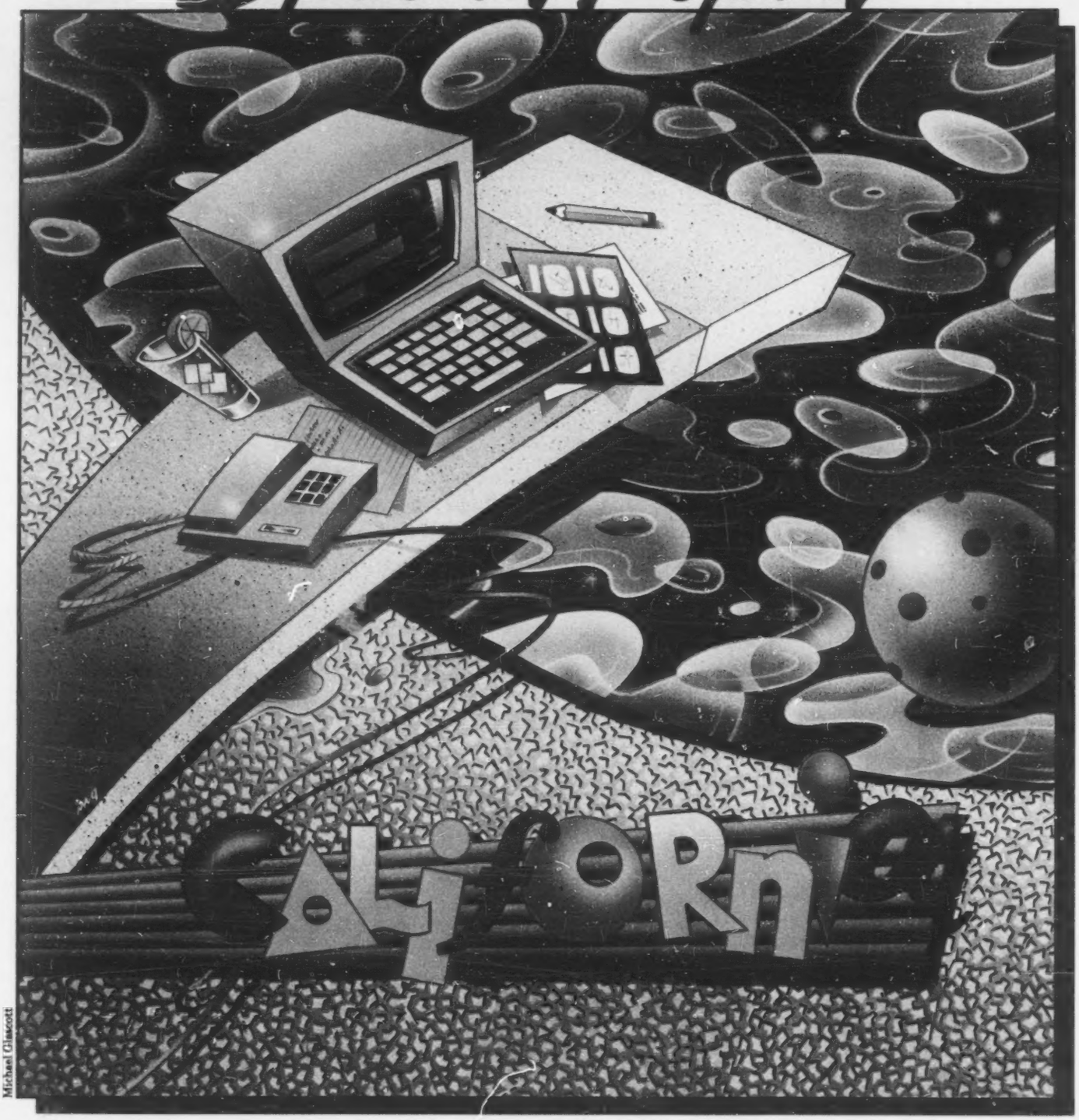
Reprinted from Oct. 11 Billboard

Music videos

1. **Dreamtime,** Daryl Hall, RCA, Matt Forest, dir., MGMM Prods. (1 wk. at No. 1)
2. **I Didn't Mean to Turn You On,** Robert Palmer, Island, Terrence Donovan, dir., Donovan Prods.
3. **Goin' Crazy!,** David Lee Roth, Warner, Peter Angelus/David Lee Roth, dirs., Diamond Dave Prods.
4. **Stuck with You,** Huey Lewis and the News, Chrysalis, Ed Griles, dir., N. Lee Lacy Prods.
5. **Take Me Home Tonight,** Eddie Money with Ronnie Spector, Columbia, Nick Morris, dir., MGMM Prods.

Top 10 for the week of Oct. 11 as seen on MTV: Music Television.

Special Report



Michael Glascott

Ad pool is crowded, but the strokes are splashy

By Jennifer Pendleton

Describing the California advertising agency business as competitive is like describing Babe Ruth as an outfielder. Somehow, the word doesn't cut it.

No one knows exactly how many ad agencies there are in California, but almost everyone agrees there are too many for too few accounts. Pacific Bell Directories reports 5,500 listings under "advertising agency" in its California phone books.

The American Assn. of Advertising Agencies says that, including the local branches of New York and Chicago-based shops, it has 200 California members—65 in Los Angeles, 55 in San Francisco and the rest scattered mainly around Orange and San Diego counties.

The Four A's reports that its California members collectively had 1985 billings of $3.2 billion. Los Angeles-area agencies represent $2.1 billion of that total; San Francisco-area agencies, $1.1 billion.

New York sharpies transferred to agency branch offices in Los Angeles or San Francisco typically have the idea they will show the provincials how business is done. They find out that in order to survive they must scurry for $1 million and $2 million accounts just like the small shops. They find they too can be fired at the whim of an entrepreneur.

"I thought when I came out here I would find everything very laid-back," recalls Richard Kelly, a 3-year California resident who is trying to build Scali, McCabe, Sloves' fledgling Los Angeles office from scratch. "But I found that was not the case . . . Here, clients dispose of agencies frequently. And you've got to learn how to make money out of small accounts."

Ron Colnett, chairman of DFS Dorland's San Francisco office, laments the fragile nature of agency/client partnerships in the West. "There seems to be less interest in long-term relation-

(Continued on Page S-4)

Top advertisers based in California

1985 ad expenditures

Client	($ millions)
1. Toyota Motor Sales USA	$172.0
2. Nissan Motor Co.	162.6
3. American Honda Motor Co.	156.5
4. Walt Disney Productions	140.0
5. Clorox Co.	107.1
6. Mazda Motors of America	101.7
7. MCA	98.4
8. Mattel	85.1
9. Apple Computer	83.9

Ad pool is crowded

(Continued from Page S-1)

ships," he says.

"There are smaller, more mercurial clients. The marketplace is much more volatile."

But wait a minute. Isn't the market changing? With the growth of the California economy, particularly through the expansion of trade with Asia, the state is an emerging major market with sophisticated clients and cutting-edge creativity.

In part, this is true. A number of major accounts, particularly the Japanese automotive marketers, have emerged as major national advertisers based on the West Coast. And a thriving, creative group of advertising agencies has put California on the map nationally.

It was Los Angeles-based Chiat/Day that stunned the ad community with its breakthrough "1984" for Apple Computer. San Francisco-based Hal Riney & Partners continues to reap the highest accolades for its work for E&J Gallo's Bartles & Jaymes wine cooler. And Foote, Cone & Belding, San Francisco, introduced all of us to the hip world of Levi Strauss' "501 Blues." With these triumphs and others, California agencies have gained a self-confidence that bodes well for the future.

Undeniably, the California agency business has grown dramatically in recent years. Advertising Age's ranking of the top 100 U.S. ad agencies in 1976 listed only two West Coast companies: Los Angeles-based Eisaman, Johns & Laws, with worldwide billings of $25.3 million, and Los Angeles-based Dailey & Associates at $24.8 million. But 10 years later, there are six: Chiat/Day; Admarketing; Dailey; Davis, Johnson, Mogul & Colombatto; Eisaman, Johns & Laws—all in Los Angeles—and Allen & Dorward, San Francisco (AA, March 27). *(See chart on Page S-9.)*

While the long-term future of the California agency business seems strong, economic expansion can't happen soon enough for the legions of agencies trying to prosper. At present, only eight West Coast-based marketers are large enough to merit a spot on Advertising Age's 100 Leading National Advertisers ranking (AA, Sept. 4). The largest, Toyota Motor Sales USA, ranks 45th.

And lately, it's been hard times for the agency business in California. The economy is soft, and there have been many changes stemming from mergers. Nearly $100 million in business recently left the San Francisco Bay area (AA, Aug. 18).

In addition, agencies have had to weather the severe economic downturn in the Silicon Valley. While only a few years ago high technology was the leading source of growth for San Francisco agencies, a national slump in personal computer sales brought the worst recession of high tech's rollercoaster 20-year history. Many agencies were left with whopping uncollectible accounts receivable; some went under. "There wasn't an agency around that didn't get burned," says Alan O. Pando, president, DDB Needham/West, Los Angeles.

But most observers see these as only temporary problems. "The advertising business has always gone through its highs and lows, but I don't see it as a long-term trend," says Laura Murphy, partner of Baeder/-Murphy, a Los Angeles-based executive-recruiting company specializing in marketing and advertising. Ms. Murphy maintains there is still a strong demand for seasoned talent and thinks that will continue.

And a thriving, creative group of agencies has put California on the map nationally.

Ted Burnett, president of Tracy-Locke, Los Angeles, believes the West Coast eventually will become *the* growth market as U.S. links to Asia increase. "Europe as a marketing area for American business is drying up," Mr. Burnett says. "The major economic growth will be Asian-based." He points to the billions of dollars in Japanese business now on the West Coast; "That didn't even exist 25 years ago," he says.

The *Journal of Commerce* reports that in 1982 U.S. trade with Pacific nations eclipsed U.S. trade with Europe. In 1984, it totaled $164 billion compared to $127 billion in European trade. Economists project continued and accelerating growth for years to come.

A few agencies already have taken steps to put themselves in line for the business. In 1983, the largest U.S. agency, Young & Rubicam, formed a third network with Japanese powerhouse agency Dentsu to create a new entity, DYR. Its Los Angeles office now represents an impressive list of Japanese clients marketing their products in the U.S., including House Foods, Nissin Foods, NGK spark plugs, Scripto Tokai, Sanyo Electric and U.S. Suzuki Motor Corp.'s motorcycle business.

"Our links to Japan are a major advantage in getting Japanese business. They open doors for us," says Bill Lyddan, director of client services at DYR, Los Angeles.

Almost every major agency in Los Angeles, San Diego and San Francisco hopes to be in a position to benefit from this expansion—and the trend hasn't escaped the attention of the large, multinational ad agencies.

SOUTHERN CALIFORNIA'S BEST MARKET IS ITS WORST KEPT SECRET

Orange County, Southern California's most affluent market with a median household income 29% higher than Los Angeles, is now a national advertising target. In 1985, its leading newspaper — The Orange County Register — carried more full-run daily advertising than any other newspaper...in the nation.

Source: Media Records, Inc., 1985

THE ORANGE COUNTY Register
METROGROUP

The *only* way to influence Southern California's best market.

Ad pool is crowded

(Continued from Page S-4)

That's one of the main reasons those agencies, over the past 15 years, have been buying up California's independent agencies at a rapid clip.

In 1970, Ogilvy & Mather acquired Carson/Roberts, then Los Angeles' largest agency with $30 million in billings.

A few years later, BBDO bought Los Angeles' Hall Butler Blatherwick and N W Ayer bought Jorgensen Macdonald, Los Angeles.

Since 1980 there have been a host of other acquisitions: Interpublic Group of Cos. bought Los Angeles-based Dailey & Associates; Saatchi & Saatchi acquired Orange County's largest agency, Cochrane Chase, Livingston & Co., Newport Beach, Cal.; Cunningham & Walsh purchased Reiser, Williams, DeYong, an Irvine, Cal.-based agency specializing in high-tech accounts, and Dancer Fitzgerald Sample bought out Wilton, Coombs & Colnett, a successful San Francisco independent.

As the multinationals buy up the independents, the character of the market is changing. Today, national agencies handle the bulk of all area billings. "There is a tremendous misconception among advertising professionals that the west is a big gaggle of independent boutique shops. That's simply not the case anymore," Tracy-Locke's Mr. Burnett says.

But while fewer independent agencies remain, there are still a substantial number of entrepreneurs willing to take the risk of going into business for themselves.

Their attitude reflects what's traditionally been considered a California perspective: Optimism and commitment to forging their own destiny.

Ray Coen, a former BBDO/West executive, formed West Los Angeles-based Ray Coen Co. five years ago. "Clients and agencies tend to mirror each other," he explains.

"In California, there will always be a core of new, entrepreneurial companies willing to take a chance," he says. As head of his own agency, Mr. Coen adds that he is "entitled to make my own mistakes, live by my own decisions. And reap the rewards and penalties."

Most observers predict that more new agencies will form, particularly in light of the merger trend.

Professionals let go in the consolidations, or disillusioned by the changing nature of their agencies, may jump ship to form their own businesses.

Yet the landscape is littered with the remains of small shops that haven't made it. And it's a sure bet there will be other casualties as the competition intensifies.

A sure attention-getter for a small agency is excellent creative work.

San Francisco-based Goodby, Berlin & Silverstein, an agency formed by former Ogilvy & Mather associates of Hal Riney, currently is on a roll.

Although the agency is small —with only around $20 million in billings—it has won the advertising industry's highest awards through daring work for the *San Francisco Examiner* and the Mill Valley Film Festival, among others.

Jeff Manning, senior vp for Ketchum Advertising, has been working in San Francisco for the past 13 years. During that time he's seen California's creative output become increasingly sophisticated.

"It used to be that we had to say 'We may not do as good work, but it sure is pretty out here.' That's not the case anymore. The look and feel of California's creative work has become very big time," he says.

So while he used to always advise fresh-from-college job aspirants to go to New York, now he tells them they can learn much of what they need to know on the West Coast. "[Going to New York] is not so mandatory anymore," he says.

Still, some, such as Los Angeles-based marketing consultant Marvin Corwin, insist the West Coast still has a long way to go when it comes to training agency personnel.

Because of the presence of Hollywood, Los Angeles has a thriving creative community, says Mr. Corwin. But he thinks the account side is a different story. With the absence of large package-goods companies as training ground, account executives often are ill-equipped for the challenges they face, he maintains.

"People out here don't know what an account executive is," Mr. Corwin says.

The combination of strong creative and weak account service means that sometimes West Coast agencies "feel the need to shoot from the hip," he says.

"They stop selling the product and get caught up in form without substance. Somtimes, I don't know if they're selling anything."

J.
WALTER
SHAPE

A lot of people have never heard of the Health & Tennis Corporation of America.

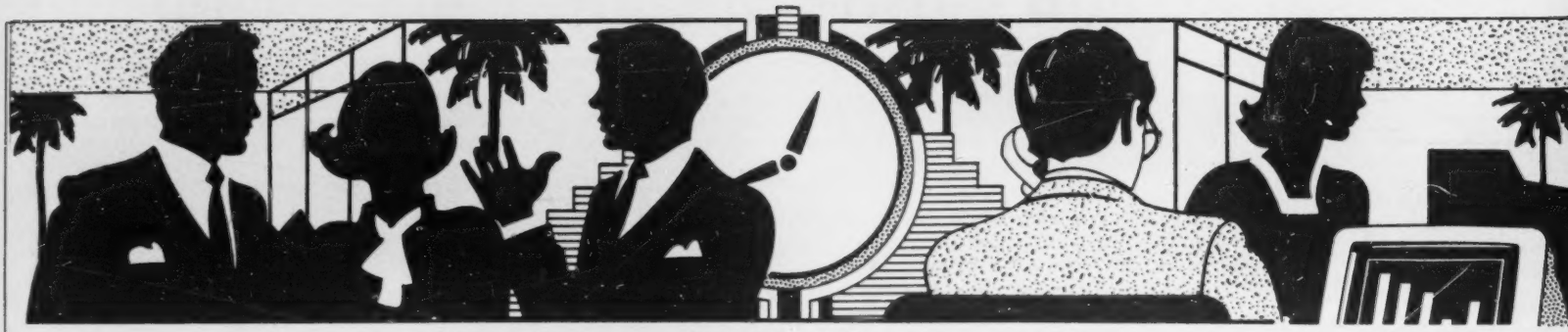
But a whole lot of people remember the advertising of the 300 different health clubs they own around the country. Holiday Spa Health Club in Southern California; Chicago Health Clubs in Chicago; President's Health Clubs in Dallas and Houston; Vic Tanny in Detroit; Jack LaLanne in New York, and many more.

Since 1976 J. Walter Thompson/West has had the enviable task of creating advertising for the Health & Tennis Corporation with America's strongest examples of fitness—some of its most popular TV and movie stars, culminating in 1985 with Cher.

We believe in physical fitness. But there's a lot to be said for fiscal fitness too. And we're delighted that our efforts have helped make the Health & Tennis Corporation of America the largest and most successful company of its kind in the world.

That's J. Walter Response. Interested? Call Jim Agnew at (213) 553-8383.

J.
WALTER
LA



Top independent California agencies

Agency	City	World billings 1985	World billings 1984	World gross income 1985	World gross income 1984
1. Chiat/Day	Los Angeles	$294,289,000	$226,551,067	$44,137,000	$27,800,300
2. Admarketing	Los Angeles	170,467,000	160,467,000	30,500,000	28,100,000
3. Dailey & Associates	Los Angeles	140,884,000	147,907,000	21,122,000	22,175,000
4. Davis, Johnson, Mogul & Colombatto	Los Angeles	116,375,000	101,440,000	16,890,000	14,066,800
5. Eisaman, Johns & Laws	Los Angeles	85,050,000	80,402,050	12,757,600	12,050,000
6. Cochrane Chase, Livingston & Co.	Newport Beach	69,480,000	51,800,000	8,884,000	6,650,000
7. Allen & Doward	San Francisco	65,900,000	52,600,000	9,463,000	8,002,000
8. Keye/Donna/Pearlstein	Los Angeles	54,588,661	42,056,882	8,184,207	6,308,347
9. Geisz International	Los Angeles	54,000,000	51,000,000	8,100,000	7,650,000
10. Phillips-Ramsey Co.	San Diego	50,590,600	37,226,600	7,584,800	5,581,200
11. Krupp/Taylor	Los Angeles	50,400,000	40,010,000	7,560,000	6,001,500
12. Vicom Associates	San Francisco	50,326,732	50,248,375	5,350,060	5,370,944
13. Lorsch Group	Los Angeles	34,400,000	39,000,000	5,300,000	6,300,000
14. Tycer Fultz Bellack	Palo Alto	31,614,615	44,278,939	3,699,197	5,177,739
15. Louis & Saul International	Santa Monica	30,688,000	21,450,000	4,300,000	3,200,000
16. Girvin Conrad & Girvin	Rancho Cordova	26,580,000	21,250,000	3,987,000	2,550,000
17. Kresser, Craig/D.I.K.	Los Angeles	19,500,000	—	2,925,000	—
18. Busse & Cummins	San Francisco	19,328,000	15,000,000	2,862,000	2,221,000
19. Gumpertz/Bentley/Fried	Los Angeles	18,184,347	16,500,000	2,294,580	2,102,184
20. Pine, Garvin, Herbers & Hock	San Francisco	17,715,747	19,026,255	2,459,635	3,420,537
21. Goodby, Berlin & Silverstein	San Francisco	15,000,000	7,000,000	2,250,000	1,050,000
22. Baxter, Gurian & Mazzei	Los Angeles	13,300,000	12,270,000	1,900,000	1,750,000
23. Battenberg, Fillhardt & Wright	San Jose	13,047,598	13,103,637	1,947,183	2,078,945
24. Bermudez & Associates	Beverly Hills	11,563,099	8,793,448	1,733,598	1,318,358
25. InterCommunications	Newport Beach	11,349,829	7,489,056	1,626,661	1,062,827
26. Pearlman Wohl	Los Angeles	10,663,800	5,807,000	1,089,000	637,000
27. Roggers, French & Co.	Irvine	10,400,000	8,762,730	1,558,988	1,322,313
28. Estey-Hoover Inc.	Irvine	10,218,344	8,262,540	784,054	646,132
29. McLean-Stewart Advertising	San Mateo	10,000,000	8,900,000	1,500,000	1,335,000
30. Salvati Montgomery Sakoda	Santa Ana	9,913,514	7,321,739	1,486,284	1,097,712

1985 California branch billings

Agency	City	Total billings
1. Foote, Cone & Belding	Los Angeles	$225,000,000
2. Foote, Cone & Belding	San Francisco	205,000,000
3. J. Walter Thompson	San Francisco	134,300,000
4. DDB/West*	Los Angeles	128,600,000
5. McCann-Erickson	San Francisco	117,000,000
6. Ogilvy & Mather	Los Angeles	112,000,000
7. J. Walter Thompson	Los Angeles	111,900,000
8. Needham Harper Worldwide*	Los Angeles	99,100,000
9. DFS/Dorland	Los Angeles	95,000,000
10. Bozell, Jacobs Kenyon & Eckhardt	Los Angeles	85,500,000
11. DYR	Los Angeles	76,400,000
12. Ogilvy & Mather	San Francisco	71,000,000
13. Della Femina, Travisano & Partners	Los Angeles	67,000,000
14. McCann-Erickson	Los Angeles	66,900,000
15. BBDO*	Los Angeles	62,500,000
16. Tracy-Locke	Los Angeles	52,600,000
17. Lowe Marschalk	San Francisco	51,800,000
18. Eisaman, Johns & Laws	Los Angeles	46,800,000
19. Wells, Rich, Greene	Los Angeles	43,000,000
20. Reiser Williams (C&W)	Los Angeles	40,000,000
21. DDB*	San Francisco	35,300,000
22. DFS/Dorland	San Francisco	35,000,000
23. Young & Rubicam	San Francisco	32,400,000
24. D'Arcy Masius Benton & Bowles	San Francisco	28,000,000
25. BBDO*	San Francisco	27,200,000
26. N W Ayer	Los Angeles	26,600,000
27. HCM	Los Angeles	26,500,000
28. Evans Communications	Los Angeles	20,000,000
29. D'Arcy Masius Benton & Bowles	Los Angeles	15,000,000
30. Campbell-Ewald	Los Angeles	13,700,000
31. Evans Communications	San Francisco	13,000,000
32. Backer & Spielvogel	Los Angeles	5,000,000

*now part of Omnicom

Consumer Magazine Ad Linage

Advertising pages for U.S., Canadian and foreign consumer publications

October

	Current month 1986	Current month 1985	Year-to-date 1986	Year-to-date 1985
— Art & antiques —				
Art & Antiques	61.7	42.6	439.7	253.2
Southwest Art	97.7	154.2	721.6	848.3
Total Group	**159.4**	**196.8**	**1,161.3**	**1,101.5**
% change		−19.0%		+5.4%
— Auto/cycle/rec. vehicles —				
Autoweek (52X)	131.0	131.0	1,425.0	1,331.0
Car & Driver	74.6	83.2	886.7	963.0
Car Collector & Car Classics	23.4	20.8	162.9	186.9
Car Craft	69.7	68.5	748.8	753.9
Circle Track	48.0	40.0	610.5	527.2
Cycle	24.5	34.2	436.5	515.9
Cycle Guide (11X)	—	23.3	384.1	399.6
Cycle World	22.3	31.0	453.7	556.6
Dirt Rider	26.1	26.5	389.8	312.1
Dune Buggies & Hot VWs	83.5	93.2	871.4	938.7
Family Motor Coaching	132.4	137.1	1,452.2	1,465.3
4 Wheel & Off-Road	73.0	91.7	862.3	776.7
Four Wheeler	72.7	94.2	825.9	870.2
Hot Rod	51.4	51.5	612.5	602.8
Motorcyclist	22.6	27.0	461.7	386.8
Motor Trend	71.9	61.1	642.5	722.2
Motorhome Life	72.5	96.5	916.4	959.8
Rider	31.3	33.2	492.9	541.5
Road & Track	88.7	106.5	963.0	1,100.3
3 Wheeling	43.2	69.9	558.8	589.2
Trailer Life	86.9	97.5	1,112.2	1,218.0
Total Group	**1,249.6**	**1,414.9**	**15,269.7**	**15,717.7**
% change		−11.7%		−2.9%
— Boating & yachting —				
Boating	140.3	113.9	1,388.2	1,357.0
Chesapeake Bay	60.8	54.3	400.0	339.8
Cruising World	267.3	312.3	1,353.8	1,442.9
Lakeland Boating (10X)	71.1	61.5	629.1	591.0
Motor Boating & Sailing	145.1	157.3	1,708.8	1,673.0
Sail	119.4	131.7	1,137.3	1,326.1
Small Boat Journal(6X)	36.2	39.9	249.2	233.9
Trailer Boats(11X)	28.8	29.4	423.8	345.8
Western Boatman(6X)	—	—	195.3	233.8
Yachting	142.6	159.7	1,390.8	1,637.8
Total Group	**1,011.7**	**1,060.0**	**8,876.2**	**9,181.1**
% change		−4.6%		−3.3%
— Canadian —				
L'Actualite	99.8	102.3	798.6	631.9
Chatelaine:				
English Edition A.	101.9	112.3	914.9	895.9
French Edition	89.2	86.4	783.3	714.4
City & Country Home(8X)	94.8	62.5	428.7	323.5
Flare A.	101.6	91.4	808.2	678.7
Macleans (52X) A.	180.4	198.2	1,219.9	1,201.7
Moneywise	42.0	43.9	344.6	320.1
Montreal Calendar	25.6	41.0	309.7	221.8
Montreal Ce Mois Ci	40.2	46.3	268.2	363.8
Reader's Digest:				
Canadian-English A.	57.9	101.6	729.6	709.2
Canadian-French A.	52.5	70.5	608.4	542.2
Total Group	**885.9**	**956.4**	**7,214.0**	**6,603.2**
% change		−7.4%		+9.3%
— Civic/fraternal —				
American Legion	35.7	28.3	247.1	260.6
Elks (10X)	18.6	20.8	165.7	173.7
Kiwanis	18.8	18.8	162.5	152.1
Lion (10X)	9.0	6.0	56.6	52.0
Rotarian	15.7	12.3	147.2	111.3
V.F.W. (11X)	37.4	33.6	253.5	252.0
Total Group	**135.2**	**119.8**	**1,032.6**	**1,001.7**
% change		+12.9%		+3.1%
— Comics —				
DC Comics	7.0	6.0	54.0	69.5
Marvel Comics Group	10.0	10.0	76.0	71.5
Total Group	**17.0**	**16.0**	**130.0**	**141.0**
% change		+6.3%		−7.8%
— General —				
American Health (10X)	62.8	54.9	493.4	416.6
The Atlantic A.	37.9	43.1	349.2	450.1
Bon Appetit A.	109.9	121.6	795.7	853.8
Changing Times	67.8	43.8	500.9	385.4
Connoisseur	119.4	115.6	673.7	622.0
Consumers Digest (8x)	12.5	20.2	147.3	165.7
Ebony	90.3	84.2	923.6	909.7
Fifty Plus	44.1	45.5	291.9	348.8
Food & Wine	107.7	58.2	507.3	470.7
Games	12.7	21.2	155.0	171.3
Gourmet	128.6	109.8	889.3	862.7
Harper's A.	18.8	23.6	223.7	253.6
Harrowsmith (6X)	41.9	—	199.3	—
Let's Live	57.0	46.0	489.0	415.0
Life	38.1	89.6	500.7	622.4
Modern Maturity (6X)	54.2	45.1	228.5	230.1
Money	155.3	131.6	1,189.0	1,162.9
Moneyworth	13.5	14.2	44.0	51.4
Mother Earth News (6X)	62.5	50.7	249.5	229.6
National Geographic	19.9	20.3	213.0	220.7
Natural History	49.0	56.1	405.0	421.3
Prevention	69.6	63.3	612.1	601.1
Psychology Today	29.5	30.9	276.2	243.1
Reader's Digest A.	108.0	95.0	923.4	773.2
Saturday Evening Post (9X)	39.0	39.4	266.3	258.2
Signature	97.4	71.7	692.1	539.2
Smithsonian	95.1	112.1	778.3	882.5
Sylvia Porter's Personal Finance (10X)	48.5	46.7	330.9	200.7
Town & Country	192.8	182.1	1,231.5	1,303.1
Travel & Leisure	164.5	122.5	1,024.9	1,040.3
Vanity Fair	72.4	40.5	444.1	330.3
Writer's Digest	26.3	22.9	249.1	242.4
Yankee	114.9	111.2	114.9	111.2
Total Group	**2,361.8**	**2,133.4**	**16,412.7**	**15,789.0**
% change		+10.7%		+4.0%
— Home —				
Americana (6X)	25.0	45.1	136.4	182.9
Architectural Digest A.	195.4	159.6	1,212.7	1,242.5
Better Homes & Gardens	135.3	118.0	1,067.0	1,084.2
Colonial Homes (6X)	88.2	80.2	321.3	314.4
Columbus Monthly-Homes(4X)	23.7	20.4	105.4	47.1
Country Home (6X)	60.5	44.0	235.3	163.6
Country Living	93.4	88.7	728.6	691.3
Dallas/Ft. Worth Home & Garden	78.4	103.8	759.8	799.0
Family Handyman (10X) A.	53.2	71.6	481.0	543.7
Flower & Garden (6X)	34.2	46.6	190.6	205.4
Home	73.5	53.3	506.5	490.0
Home Mechanics	65.9	78.7	593.2	650.9
The Homeowner (10X)	35.1	38.3	256.3	242.1
Horticulture	28.6	25.6	366.1	334.6
House Beautiful	83.0	91.9	709.2	823.2
House & Garden	138.5	121.4	931.5	938.8
Houston Home & Garden	76.6	108.8	739.9	928.5
Metropolitan Home	60.5	80.5	565.4	639.4
1,001 Home Ideas	55.5	60.7	454.8	496.7
Phoenix Home/Garden	104.5	89.8	695.8	660.5
Practical Homeowner	54.2	58.6	429.2	451.8
Rodale's Organic Gardening	39.0	51.4	563.3	557.8
San Diego Home/Garden	76.0	76.5	680.5	753.3
Southern Accents (6X)	—	—	490.8	435.2
Southern Living	158.2	158.7	1,374.8	1,301.4
Sunset Magazine A.	145.9	191.0	1,347.3	1,427.9
Texas Homes	52.5	91.5	597.4	801.1
Workbench (6X)	—	—	236.6	264.7
The Workbasket	45.5	36.2	316.3	341.4
Total Group	**2,080.4**	**2,190.7**	**17,092.9**	**17,813.3**
% change		−5.0%		+4.0%
— In-flight & other passenger —				
Alaska Airlines	57.2	57.8	588.8	493.0
America West Airlines	26.5	—	244.7	—
East/West Network:				
Eastern Review	81.7	96.8	972.3	950.4
Northwest	50.2	56.3	454.9	420.3
Ozark	44.7	57.8	445.3	425.5
PSA Magazine	95.5	105.7	891.6	828.0
Pan Am Clipper	39.0	68.2	440.5	615.2
Spirit	93.0	136.3	961.3	960.8
TWA Ambassador	44.3	—	44.3	—
United	94.2	127.0	941.8	934.7
Western's World	58.8	72.7	583.2	547.4
Hawaii (6X)	27.2	21.5	277.1	233.9
Pace	74.9	78.3	823.1	706.5
Presidential Airways (6X)	7.3	—	45.1	—
Spirit of Aloha (6X)	24.4	20.4	275.5	231.9
Total Group	**819.0**	**900.9**	**7,989.5**	**7,347.5**
% change		+9.1%		+8.7%
— Men's —				
Esquire A.	107.8	118.0	954.0	1,024.2
Firehouse Magazine (13X)	81.3	49.8	449.1	489.0
M Magazine	99.7	72.0	624.1	543.5
Penthouse A.	41.8	42.7	371.5	399.6
Playboy A.	61.4	92.1	597.9	723.9
Salute	—	—	91.0	—
Total Group	**392.0**	**374.5**	**3,087.6**	**3,180.2**
% change		+4.7%		−2.9%
— Metropolitan —				
Aloha (6X)	34.2	28.8	148.2	154.3
Atlanta	58.1	62.5	524.6	530.5
Baltimore	110.9	80.8	777.7	796.8
Boston	181.7	178.4	1,527.1	1,528.7
California	84.4	85.4	681.5	682.2
Chicago	165.1	172.0	1,305.8	1,319.2
Chicago's North Shore	93.7	94.9	816.1	791.4
Cincinnati	113.8	102.1	633.3	581.2
Cleveland	81.2	92.5	698.4	781.4
Coast (39X)	254.2	338.6	2,340.7	2,547.8
Columbus Monthly	80.9	81.3	694.7	705.0
Connecticut	112.7	110.9	946.1	896.2
D/Magazine, Dallas/Ft. Worth	143.3	164.2	1,211.3	1,315.1
Detroit Monthly	87.1	94.7	747.3	612.2
Grand Rapids	35.7	38.3	424.3	515.8
Honolulu	119.2	112.6	723.0	701.5
Houston City	54.4	69.3	502.3	685.7
Louisiana Life (6X)	—	—	192.0	275.0
Madison	62.0	60.0	635.0	506.6
Metropolitan Detroit	94.0	82.0	743.0	723.5
Miami Mensual	48.6	45.5	445.4	382.8
Miami/South Florida	53.3	104.1	646.6	881.2
Mid Atlantic Country	42.8	49.7	399.2	454.6
Milwaukee	64.2	78.3	647.6	625.1
Minneapolis/St. Paul	117.3	95.2	970.2	954.1
Nashville	54.0	64.0	389.0	391.0
New England Monthly	48.7	39.7	381.4	308.9
New Jersey Monthly	87.4	76.9	792.7	611.6
New Mexico	30.8	31.5	272.4	361.9
Ohio	52.3	62.8	580.0	676.7
Oregon	19.6	29.8	294.8	332.1
Orlando	90.0	89.7	978.3	983.2
Palm Beach Life	70.9	73.7	568.5	678.5
Palm Springs Life	85.6	84.0	1,114.3	1,116.3
Philadelphia	165.4	164.9	1,319.0	1,354.7
Phoenix	69.6	85.9	890.8	971.1
Pittsburgh	77.2	72.8	654.0	632.0
St. Louis	61.1	49.3	498.5	542.8
San Diego	135.0	150.5	1,341.4	1,541.3
San Francisco Focus	135.3	108.8	933.2	896.8
Texas Monthly	135.3	146.1	1,193.9	1,216.6
Twin Cities	61.0	61.5	541.0	595.2
Ultra	73.0	86.1	586.6	728.3
The Virginian	—	—	310.0	277.0
Washington (7X)	62.0	50.5	373.0	194.5
Washington Dossier (11X)	39.3	65.0	427.9	531.3
The Washingtonian	175.0	225.0	1,493.9	1,578.7
Total Group	**4,021.4**	**4,240.3**	**35,315.8**	**36,468.2**
% change		−5.2%		−3.2%
— Movie/romance/radio/tv —				
Macfadden's Women's Group:				
Modern Romances	25.0	24.6	215.4	195.4
Secrets	25.0	24.6	215.4	195.4
True Confessions	25.0	24.6	215.4	195.4
True Experience	25.0	24.6	215.4	195.4
True Love	25.0	24.6	215.4	195.4
True Romance	25.0	24.6	215.4	195.4
Sterling Women's Group:				
Daytime TV	25.5	27.5	255.2	284.0
Modern Screen	15.5	15.5	79.2	101.5
Movie Mirror (6X)	—	15.5	18.5	87.0
Soap Opera Stars	15.8	16.5	78.6	93.6
TV Game Show	27.0	—	72.0	—
TV Movie Screen (6X)	8.3	8.0	42.8	35.3
TV Picture Life (6X)	—	9.0	14.2	33.0
Total Group	**242.3**	**239.8**	**1,852.7**	**1,806.6**
% change		+1.0%		+2.6%
— Music/entertainment —				
Audio	264.8	212.4	922.0	893.6
Dance Magazine	47.3	60.1	515.0	550.9
Musician	49.3	66.3	554.3	586.3
Playbill	62.5	57.2	445.8	486.0
Stereo Review	76.6	60.8	698.5	482.2
Video Magazine	79.0	77.0	753.6	736.7
Total Group	**579.5**	**533.8**	**3,889.1**	**3,735.7**
% change		+8.6%		+4.1%
— National Sunday magazines —				
Parade (52X)	60.9	68.5	527.7	537.5
Total Group	**60.9**	**68.5**	**527.7**	**537.5**
% change		−11.1%		−1.8%
— Outdoor & sport —				
Alaska	54.2	43.2	438.1	440.2
The American Handgunner(6X)	51.0	37.0	163.0	173.0
American Hunter	33.4	27.6	210.9	205.7
American Rifleman	29.0	33.5	252.1	269.4
Backpacker (6X)	—	—	140.5	164.5
Bass Master (9X) A.	29.3	28.0	411.4	421.5
Bicycling (9X)	—	—	639.3	756.6
Duck's Unlimited (6X)	—	—	166.0	159.0
Field & Stream	92.7	78.0	906.7	878.6
Fins & Feathers A.	28.1	27.3	330.3	301.2
Florida Sportsman	80.1	74.1	1,064.4	976.0
Flying	38.2	50.0	392.2	469.3
Golf Digest	63.2	71.3	949.8	913.5
Golf Magazine	39.4	35.5	675.3	635.4
Gun Dog (6X)	—	—	174.3	145.1
Guns	35.0	33.0	312.0	240.0
Guns & Ammo	57.4	57.8	502.4	452.8
In-Fisherman (6X)	43.0	41.0	408.0	447.0
Muscle & Fitness	115.3	109.0	1,099.8	1,066.3
Outdoor Life	85.1	77.1	777.5	715.0
Outside Magazine	47.3	49.8	471.6	424.1
Petersen's Hunting	79.8	81.2	518.9	457.5
Runner	28.8	45.7	298.1	354.5
Runner's World (13X)	38.3	53.6	310.1	394.1
Salt Water Sportsman	64.9	67.6	863.2	819.2
Shooting Times	43.4	46.5	372.6	354.8
Ski (8X) A.	147.0	121.9	552.2	479.3
Skiing (7X)	148.0	181.2	522.6	586.5
Skin Diver	80.6	71.0	920.2	805.1
Southern Outdoors (8X)	34.7	34.6	329.9	283.9
Sport	45.5	60.1	387.6	436.8
Sports Afield	79.0	101.9	721.8	858.2
Tennis	47.2	48.9	726.8	868.6
Western Outdoors (10X)	26.8	34.9	402.9	392.5
Wildfowl (6X)	29.1	14.3	100.1	29.1
Wing & Shot	—	—	10.0	—
Total Group	**1,814.9**	**1,836.5**	**17,522.5**	**17,374.3**
% change		−1.2%		+0.9%

(X) Represents the number of times published each year; publications are monthly unless otherwise specified.

A. Sectional linage included but prorated to circulation of regional editions. B. Sectional linage included but not prorated to circulation of regional editions. C. Combined unduplicated regional ads. * All affiliated with Sunday Mag/Net. except Los Angeles Times Magazine and New York Times Magazine.

All figures represented in this chart are supplied by the magazines. Advertising Age makes no attempt to verify them and, therefore, is not responsible for inconsistencies or errors.

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October

	Current month 1986	Current month 1985	Year-to-date 1986	Year-to-date 1985
— Photography —				
American Photographer	40.5	45.3	385.1	400.1
Petersen's Photographic	32.1	30.9	253.0	284.6
Popular Photography	66.8	78.5	648.4	857.7
Total Group	139.4	154.7	1,286.5	1,542.4
% change		+9.9%		+16.6%
— Religious —				
Charisma	42.5	—	654.7	—
Christian Herald (11X)	31.0	32.8	252.7	287.2
Christian Life	25.2	—	193.0	—
Christianity Today (18X)	57.2	77.7	435.8	583.3
Ministries Today (6X)	34.8	51.3	264.0	—
Moody Monthly (11X)	52.4	71.6	387.1	477.6
Today's Christian Woman(6X)	—	—	145.3	215.2
Total Group	243.1	233.4	2,332.5	1,563.3
% change		+4.1%		+49.2%
— Science/electronic/mechanic —				
Discover	44.0	41.4	325.7	327.9
Family Computing	54.4	42.8	429.2	381.1
Info World (52X)	136.0	158.0	1,236.0	1,268.0
Omni	86.5	85.4	570.7	590.1
Personal Computing	179.6	147.1	1,184.7	1,445.0
Popular Science	66.4	83.5	672.2	645.7
Science 86 (10X)	—	—	—	—
Scientific American	55.8	43.2	335.1	442.7
Spectrum	76.8	86.5	823.3	1,031.9
Total Group	699.5	687.8	5,577.0	6,132.3
% change		+1.7%		−9.1%
— Woman/fashion/service —				
Bride's Magazine (6X) A.	231.3	190.7	1,792.7	1,544.2
Cosmopolitan A.	258.3	236.3	2,041.2	1,965.0
Essence	81.3	73.7	803.6	787.9
Family Circle (17X) A.	209.2	139.0	1,446.1	1,467.9
Family Magazine	—	—	—	—
Glamour	207.8	199.7	1,806.8	1,791.6
Good Housekeeping A.	160.4	175.8	1,561.7	1,602.8
Harper's Bazaar	180.3	168.7	1,430.6	1,476.4
Health	37.2	47.4	397.4	402.5
Ladies' Home Journal	125.6	130.6	1,087.8	1,092.0
Mademoiselle	159.3	129.3	1,330.8	1,262.1
McCall's	104.2	104.6	909.0	909.6
Military Lifestyle	66.4	45.9	507.7	303.1
Modern Bride (6X)	179.7	155.4	1,546.8	1,475.4
Ms.	49.0	54.5	391.6	473.4
New Woman	83.8	64.9	731.0	537.4
Parents Magazine A.	142.8	141.4	955.5	875.5
Playgirl	—	—	—	—
Redbook	129.1	122.3	934.7	925.7
Self	128.1	121.4	942.4	971.1
Seventeen	116.9	116.2	1,178.1	1,257.2
Shape	68.8	55.0	724.4	620.6
Soap Opera Digest (26X)	25.1	21.0	199.7	271.6
'Teen Magazine	53.1	40.4	531.0	508.1
True Story A.	57.8	64.4	473.3	490.2
Vogue	370.1	376.7	2,659.8	2,716.1
W Magazine	142.0	148.4	1,160.3	1,117.4
Weight Watchers	33.8	32.1	334.6	283.7
Woman's Day (16X) A.	—	—	—	—
Working Mother	99.5	94.7	711.2	749.7
Working Woman	124.2	127.5	1,013.3	1,003.6
Total Group	3,625.0	3,377.9	29,603.1	28,532.0
% change		+7.3%		+2.5%
— Youth —				
Boys' Life	16.4	12.2	166.5	186.4
Campus Life (10X)	82.8	97.1	355.7	430.1
Total Group	99.2	109.3	522.2	616.5
% change		−9.2%		−15.3%

September

	Current month 1986	Current month 1985	Year-to-date 1986	Year-to-date 1985
— Business —				
Advantage	81.0	50.0	552.0	432.0
Arizona Bus. Gazette (52X)	40.5	39.3	284.2	251.4
Atlanta Bus. Chronicle (52X)	—	—	—	—
Austin Bus. Journal (52X)	40.3	61.7	391.7	522.3
Baltimore Business Journal	99.4	94.0	625.3	592.8
Barron's (52X)	237.3	223.5	1,663.6	1,676.3
Black Enterprise	49.2	45.2	662.1	643.8
Boston Business Journal (52X)	150.5	189.7	1,192.3	1,263.8
Business Atlanta	56.2	69.2	574.1	597.4
Business First of Buffalo	47.6	65.8	531.6	587.7
Business First of Columbus	100.0	76.8	745.0	580.3
Business Journal-Milwaukee	145.6	127.0	928.7	996.2
Business Journal/Sacramento	—	—	—	—
Business North Carolina	51.0	38.5	390.4	308.3
Business Week (52X) A.	392.9	381.2	2,676.4	3,038.9
Business West	—	—	104.0	79.0
California Business	—	—	—	—
Capitol District Business Review (25X)	—	—	—	—
Cincinnati Business Courier	107.7	86.1	686.5	564.1
Corporate Report/Kansas City	32.7	36.4	244.1	408.4
Corporate Report/Minnesota	—	—	—	—
Crain's Chicago Bus. (52X)	181.9	198.0	1,453.0	1,391.0
Crain's Cleveland Business(52X)	73.4	86.7	547.4	675.7
Crain's New York Business	38.7	34.8	299.8	140.4
Dun's Business Month	55.5	85.8	463.6	487.9
Financial World (26X)	128.2	62.6	572.7	420.7
Florida Trend (13X)	96.3	100.0	725.5	808.3
Forbes (26X)	293.2	339.3	2,248.9	2,435.2
Fortune (26X)	316.7	290.3	1,944.8	2,309.9
Frequent Flyer	71.6	100.2	538.2	568.6
Futures (13X)	52.7	54.5	455.9	467.5
Georgia Trend	65.0	60.0	477.6	60.0
Grand Rapids Bus. Journal	—	—	—	—
Hawaii Business	42.0	40.3	426.9	445.0
Houston Bus. Journal (52X)	—	—	—	—
Inc. Magazine A.	70.6	95.2	732.3	805.0
Income Opportunities	73.7	57.0	469.8	376.2
Industry Week (25X) A.	160.3	138.7	846.8	796.1
Indianapolis Bus. Journal (52X)	170.7	160.1	1,340.2	1,105.8
Kansas City Business Journal	—	—	—	—
Manhattan Inc.	101.4	67.7	610.9	355.1
Minnesota Business Journal	—	—	—	—
Nation's Business A.	24.2	34.1	299.7	293.5
New England Business (20X)A.	82.5	122.3	702.9	811.2
Pacific Business News (52X)	126.2	128.2	1,061.7	995.0
Philadelphia Bus. Journal(52X)	171.3	140.8	1,042.5	819.6
Pittsburgh Business Times(52X)	155.0	112.2	809.0	707.3
Regardie's	167.0	154.5	1,288.8	1,137.3
San Jose Business Journal	—	—	—	—
Savvy	40.7	37.8	280.4	279.9
South Florida Bus. Journal	199.7	150.1	1,021.3	812.9
St. Louis Business Journal (52X)	167.9	191.6	1,252.8	1,303.4
Texas Business	—	—	—	—
Venture	68.6	63.7	616.8	631.6
Total Group	4,826.6	4,690.8	34,862.2	33,982.6
% change		+2.9%		+2.6%
— National Sunday magazines —				
Parade (52X)	52.7	69.3	466.8	470.0
USA Weekend (52X)	49.7	80.5	449.5	466.8
Total Group	102.4	149.8	916.3	936.8
% change		−31.6%		−2.2%
— Newspaper Sunday magazines —				
Boston Globe	233.9	225.7	1,836.6	1,685.1
Chicago Tribune	100.0	174.0	765.8	1,001.2
Cleveland Plain Dealer	90.9	66.9	469.8	416.5
Detroit News	72.0	90.0	767.0	770.0
L.A. Times	63.6	53.0	609.0	534.7
Louisville Courier-Journal	81.7	91.5	568.1	623.1
Miami Herald	60.0	52.9	439.3	362.1
New York Times Magazine	547.2	505.6	2,865.1	3,069.6
Philadelphia Inquirer	74.6	75.6	504.6	462.0
San Francisco Image	67.4	83.8	580.3	465.1
Seattle Times	68.0	58.0	493.0	401.0
Toledo Blade Magazine	35.6	59.8	338.3	377.3
Washington Post	206.1	157.9	1,105.6	1,017.1
Total Group	1,701.0	1,694.7	11,342.5	11,184.8
% change		−0.4%		+1.4%
— Weeklies/bi-weeklies —				
The Advocate (26X)	160.0	119.7	1,232.0	829.4
Army Times Military Group:				
Air Force Times (52X)	222.5	187.0	1,620.2	1,406.8
Army Times (52X)	197.0	184.0	1,491.4	1,372.4
Navy Times (52X)	212.0	190.0	1,635.7	1,490.3
The Blood-Horse (52X)	224.4	261.1	3,124.2	3,688.8
Capper's Weekly (17X)	33.2	48.5	240.4	240.3
Commonweal (22X)	8.0	7.5	59.6	51.7
Golf World (43X)	47.2	45.8	788.3	705.8
Grit (52X) A.	29.6	24.4	217.8	176.3
National Journal (50X)	58.0	59.0	481.7	425.0
National Review (25X)	28.8	29.8	265.8	207.7
New Republic (48X)	—	—	—	—
New York Magazine (50X)	349.9	320.2	2,153.3	2,084.1
New Yorker	292.7	268.0	1,714.5	1,943.7
Newsweek (52X) A.	273.6	275.6	1,713.4	1,864.6
People (52X)	375.1	337.7	2,608.6	2,580.2
Rolling Stone (25X)	134.8	123.4	956.3	789.5
Sporting News (52X)	48.9	76.4	456.1	384.0
Sports Illustrated (52X) A.	270.3	281.1	1,916.1	1,967.6
Time (52X) A.	—	—	—	—
Travelhost (52X) C.	3,468.0	3,498.5	29,005.0	28,802.5
TV Guide (52X) A.	403.6	398.2	2,557.9	2,628.9
TV Update (52X) C.	2,180.0	2,114.0	21,319.0	20,729.0
Us Magazine (26X)	42.8	52.0	376.2	285.6
U.S. News & World Report(52X)A.	169.2	167.8	1,118.1	1,203.7
Total Group	9,229.6	9,066.7	77,051.4	75,857.9
% change		+1.8%		+1.6%
— Foreign —				
Business Week Int'l (52X)	191.1	168.6	1,140.2	1,073.1
De Armas Publications:				
Geomundo:				
Central America	5.0	4.0	34.0	40.5
Chile	5.0	5.0	38.0	43.5
Colombia	8.0	10.0	68.8	76.5
Ecuador	5.0	4.0	29.0	34.0
Mexico	10.0	16.0	74.2	71.5
Peru	4.0	5.0	25.0	41.5
Puerto Rico	3.0	2.0	25.5	24.0
U.S.	4.7	2.0	42.7	52.3
Venezuela	16.5	9.0	116.0	77.0
Hombre De Mundo:				
Central America	5.3	4.5	44.3	31.5
Chile	4.3	4.5	45.3	38.5
Colombia	20.8	19.3	126.0	70.2
Ecuador	2.3	5.5	38.3	34.0
Mexico	17.5	24.0	130.0	106.0
Peru	2.3	3.5	26.3	26.5
Puerto Rico	3.3	13.0	37.3	56.0
U.S.	5.7	10.7	84.7	77.7
Venezuela	18.8	47.0	164.3	177.0
Ideas Para Su Hogar:				
Colombia	15.2	25.5	92.2	133.2
Ecuador	1.0	5.0	17.0	42.0
Mexico	16.8	14.2	66.5	93.3
Peru	1.5	3.0	24.0	20.0
Puerto Rico	—	—	0.2	10.5
U.S.	14.0	6.0	39.0	53.0
Venezuela	9.0	16.0	81.7	143.8
Mecanica Popular:				
Argentina	7.7	—	39.7	16.3
Central America	7.8	8.2	76.0	82.8
Chile	3.3	3.3	38.3	29.2
Colombia	12.0	15.7	129.0	120.7
Mexico	16.2	19.7	100.3	134.2
Peru	10.2	10.5	88.8	99.5
Puerto Rico	5.3	5.0	57.5	79.3
U.S.	4.5	3.8	52.5	60.5
Venezuela	8.7	11.8	94.2	115.5
Vanidades Continental:				
Central America	40.3	19.5	152.3	65.2
Chile	6.8	6.3	35.0	26.0
Colombia	138.0	100.3	669.5	580.8
Ecuador	27.5	28.3	163.7	176.3
Mexico	113.0	125.3	676.5	733.8
Peru	14.8	32.3	105.0	134.2
Puerto Rico	32.0	54.5	283.0	301.2
U.S.	57.5	42.8	385.8	329.5
Venezuela	105.5	56.3	372.5	421.3
Hearst International Publications:				
Buenhogar:				
Central America	1.0	—	10.0	7.0
Chile	1.0	—	11.0	8.0
Colombia	38.8	34.5	276.0	282.0
Ecuador	11.5	14.0	97.5	141.0
Mexico	33.5	57.0	264.5	404.2
Peru	10.0	18.5	60.0	97.0
Puerto Rico	6.5	4.5	80.0	87.3
U.S.	25.2	16.7	180.5	151.5
Venezuela	15.8	29.8	180.8	289.5
Cosmopolitan en Espanol:				
Central America	4.3	1.5	33.7	10.5
Colombia	26.5	24.0	126.0	120.0
Ecuador	—	1.0	—	3.0
Mexico	44.2	54.0	344.8	397.5
Peru	—	2.0	—	23.0
Puerto Rico	11.8	16.0	91.3	180.8
U.S.(Spanish language)	31.5	18.8	224.0	150.5
Venezuela	16.3	12.8	118.7	194.3
Cosmopolitan Foreign Editions:				
Australia	88.5	79.8	567.9	550.5
Brazil	92.7	96.2	435.2	441.7
China	54.7	24.3	254.4	195.5
France	94.2	105.4	636.2	820.0
Germany	101.7	102.8	900.7	817.5
Great Britain	138.0	135.0	999.8	993.0
Greece	20.0	20.0	477.4	475.4
Holland	99.0	74.0	580.3	546.3
Italy	75.0	38.2	447.7	415.6
Japan	38.7	29.7	292.2	296.6
South Africa	101.0	101.0	741.0	749.0
Good Housekeeping Foreign Editions:				
Australia	50.4	40.4	307.7	505.2
Great Britain	125.4	139.5	1,065.2	1,083.2
Japan	74.0	67.5	651.4	360.0
International Communications:				
African Business	31.7	31.8	244.9	229.2
The Middle East	16.2	12.7	104.8	140.3
New African	16.6	15.3	158.5	141.2
International Management:				
Europe	67.7	78.0	402.7	421.2
Middle East	37.5	15.7	97.0	140.5
Johnston International:				
Alam Attijarat	43.0	48.8	301.7	401.2
Far East Business	37.8	29.2	326.0	258.4
Modern Africa (6X)	24.5	14.8	102.8	63.4
Latin America Finance (6X)	20.4	16.4	94.5	50.4
Newsweek International A.:				
Atlantic (52X)	96.0	122.7	669.1	747.1
Latin America (52X)	35.0	44.4	259.6	242.1
Pacific (52X)	78.7	81.5	495.4	528.3
Progreso (9X)	13.5	14.2	64.0	85.3
Reader's Digest:				
Arabic	13.5	10.0	58.0	92.5
Asian	159.5	230.5	1,860.8	1,778.5
Australian	48.8	58.0	485.8	485.7
Belgian-Flemish	66.5	66.0	554.9	648.5
Belgian-French	40.5	35.5	329.6	427.0
British	41.6	54.0	390.7	387.0
Chinese B.	98.5	126.0	875.8	1,100.0
Danish	47.3	45.5	263.0	278.3
Dutch	38.0	51.0	308.6	317.2
Finnish	25.8	35.5	335.8	388.4
French	9.0	28.2	120.1	365.4
German	61.0	50.4	520.2	534.9
Iberian	3.0	1.0	12.0	32.0
Indian-English	77.0	62.0	701.5	794.5
Indian-Hindi	9.5	10.0	90.0	96.5
Italian	45.5	23.5	340.0	282.0
Korean	37.0	23.0	263.0	216.2
Latin American:				
Argentina	17.0	13.0	114.5	167.5
Brazil	2.0	1.0	20.0	38.0
Central American	7.0	10.0	56.0	78.0
Chile	14.5	8.5	91.0	93.0
Colombia	35.0	33.0	210.0	236.5
Ecuador	5.0	9.0	52.0	76.0
Mexico	51.6	59.3	482.6	412.7
Peru	7.0	12.0	62.0	84.5
Puerto Rico	6.0	5.0	42.5	42.0
U.P.B.	7.0	7.0	52.0	60.5
U.S. Spanish	8.5	13.5	146.5	83.5
Venezuela	8.5	8.5	92.0	89.5
New Zealand	70.5	64.0	473.8	496.0
Norwegian	6.5	16.5	64.5	169.8
Portugal	35.5	44.0	311.3	311.1
South African	93.5	104.0	680.0	798.0
Swedish	11.5	16.5	134.0	135.0
Swiss-French	15.2	23.6	171.0	203.6
Swiss-German	19.3	37.6	230.8	289.1
Time International:				
Time-Asia	88.0	112.0	594.5	726.8
Time-Atlantic	127.9	160.1	785.0	853.0
Time-Canada	232.1	235.1	1,476.7	1,379.5
Time-Latin America	55.5	77.7	384.4	385.5
Time-South Pacific	114.9	149.8	784.0	987.8
Visao (52X)	128.7	162.2	1,179.7	1,085.4
Vision/Latin America (24X) A.	40.1	32.2	234.0	222.6
Total Group	4,980.9	5,180.4	36,341.3	38,098.0
% change		−3.9%		−4.6%

FAST FOODS

(Continued from Page 1)
alone.

"There are some frayed nerves," said Charles Glovsky, analyst at Alex. Brown & Sons, Baltimore. "With sales as bad as they are, the chains have to be extremely sensitive and alert to what their competition is doing. They need to react immediately and simultaneously on several fronts, one of which is advertising. In this competitive environment, there are only going to be two types of companies: The quick and the dead."

McDonald's led the way last week, ending its NFL promotion and ushering up new creative for the McD.L.T. McDonald's had been dissatisfied with earlier McD.L.T. campaigns from Burnett and in June forced a change in the personnel handling its account (AA, June 23).

McDonald's isn't shopping its $250 million-plus account, but it is putting heavy pressure on Burnett to buttress McD.L.T. sales.

The new team was under orders to produce "breakthrough" McD.L.T. creative that would work better than the short-lived Romeo and Juliet and animated Pepe LePew spots aired during the Super Bowl.

The Burnett team delivered "Wheel of Fortune's" Vanna White and others in new executions for the McD.L.T.

The product-sell campaign shows shots of the McD.L.T. and its ingredients, as celebrities explain the McD.L.T. was misnamed. They say it's more than a burger with lettuce and tomato and should be called "The one with the works."

It remains to be seen if that set of ads will help the McD.L.T., which one source said has been "heavily media dependent," meaning that when advertising slows down for the sandwich, so do sales.

(BK is now firing back at McDonald's and is heavily advertising its burgers, particularly its basic product, the Whopper. "They were calling the McD.L.T. the 'Whopper Stopper,'" said Steve Bowen, exec vp-general manager, JWT/New York. "But it hasn't done it...we knew McDonald's would get a certain amount of trial no matter what, but once the hoopla died down, we knew we'd market against them...Everyone knows that to grow now, you have to take it out of each other's hide.")

McDonald's also has instructed Burnett to prepare a major print campaign to promote the nutritional qualities of its food, according to sources. That campaign could break as early as January. The chain, which annually has spent less than $1 million for print advertising, next year plans to spend upwards of $12 million on print, positioning itself as the fast-food industry's nutrition leader in such publications as *People*, where the McDonald's name has not been before. A company spokeswoman had no comment on the report.

Reportedly, Burnett faces an additional pressure in this new assignment: Get across the nutritional claims without drawing the ire of fast-food critics.

But Burnett is not the only fast-food agency feeling the heat:

• J. Walter Thompson USA earlier this year came close to losing its hold on the $200 million Burger King account, according to former BK president Jay Darling (AA, July 28), and that relationship still is believed to be tenuous.

There were reports last week that several agencies had been contacted about pitching the Burger King account, but BK denied the reports, suggesting that agencies may be trying to create the illusion that the account is shaky.

Also, Charles Olcott, region vp, BK Northeast region, became BK USA president, and C. Ronald Petty was named president, BK International from exec vp.

BK sales this year were running 4% to 8% below last year's levels, but the sales decline slowed in August with the reintroduction of its Chicken Tenders. Analysts say BK real sales are now at last year's levels.

• The fate of the Kentucky Fried Chicken account at Young & Rubicam, New York, is in question following PepsiCo's purchase of the chain. Y&R's handling of the Canada Dry and Dr Pepper accounts may be less of a problem than PepsiCo's interest in placing the $75 million account with one of its agencies, especially Omnicom's BBDO (recently relieved of all its assignments from BK parent Pillsbury). Omnicom affiliate Tracy-Locke, Dallas, already handles PepsiCo's Taco Bell chain.

The Pillsbury billings pulled from BBDO, however, went predominantly to Y&R, establishing a relationship with Burger King's parent company that could prove useful, to say the least, if KFC were to move.

Y&R did get a small vote of confidence earlier this month when KFC consolidated its $3.5 million Canadian account at Y&R in Toronto, giving it the English-speaking provinces previously handled by Foote, Cone & Belding, Toronto.

The wild card in the agency shuffle continues to be BBDO's Omnicom partner, DDB Needham Worldwide, which has taken on no serious fast-food business since 1981 when McDonald's dumped Needham, Harper & Steers, Chicago. Both Wendy's and Burger King are believed to be interested in Needham, but have had overtures rebuffed.

DDB Needham is one of only a few Chicago agencies large enough to handle McDonald's account (and Big Mac's local commitment ensures that it will keep the business near its suburban Oak Brook, Ill., headquarters), and chairman Keith Reinhard may still be hoping that Big Mac will return. But when Wendy's last week dropped Pepsi-Cola from its own stores in favor of Coca-Cola to protest Pepsi's growing presence in the fast-food business, it inadvertantly revealed how intertwined the fast-food and soft-drink industries have become: Would Coke's largest customer switch to an agency affiliated with Pepsi's primary shop?

Were KFC to switch to BBDO (seemingly removing DDB Needham from the arena) or if DDB Needham were to relent and take on Wendy's or BK, a flurry of agency swapping could ensue. "It would be 'change partners and dance,'" suggested an exec at one major fast-food chain.

KFC is looking at new products to increase lunch business and also healthier foods, including testing a nonfried chicken, salads, sandwiches and lowering the salt content in all products.

Emphasis at KFC will be placed on home delivery. PepsiCo president Michael Jordan, at an analysts meeting in New York last week, indicated that the computerized regional customer service centers already working for Pepsi's Pizza Hut chain could be easily expanded to incorporate its KFC as well. The centers take calls from an entire metropolitan area and pass the order along to the closest unit and keep a record of a customer's orders.

Significantly, Pizza Hut agency Chiat/Day has split the account with its Los Angeles office handling restaurant advertising, while its New York office will take over home-delivery ads.

• Wendy's chairman, Robert Barney, flatly denied any unhappiness with national agency DFS Dorland Worldwide, New York, despite persistent rumors that a serious rift exists and the fact that Wendy's this year also has used its sales-promotion and black-consumer agencies for national campaigns in place of DFS Dorland.

Mr. Barney explained the switch to Coca-Cola in a full-page "open letter" ad in the Oct. 16 *Wall Street Journal*—paid for by Coca-Cola. He said "PepsiCo's interests are in direct conflict with ours" and concluded "it's not good business to support a company that is trying to make our customers theirs."

The switch, to take place over the next 60 days, represents $1.6 billion in soft-drink retail sales at Wendy's over a five-year contract. For Coke, which claims 70% of all fountain sales, the agreement amounts to 20 million additional gallons of Coke syrup sold over the next five years. Fountain sales represent one-third of all Coke sales.

Pepsi, claiming fountain sales represent one-fifth of its total soft-drink sales, said the loss of Wendy's is minor, representing 2.5% of its fountain sales and 1% of total soft-drink sales.

Coca-Cola USA president Ed Mellett is credited with persuading Burger King to switch from Coke to Pepsi in June, 1983. Mr. Mellett was then president-Pepsi USA's foodservice division.

Wendy's, too, is considering some new tactics. In Milwaukee, the chain is testing the impact of dramatic price reductions and has added its first "small" hamburger to compete with McDonald's and Burger King's lowest-price burgers (AA, Oct. 13). If successful, that tactic and the new product rapidly could be expanded to other markets.#

A line of finger-snapping raisins is from one of several recent spots featuring manipulated clay figures.

Clay people invade world of advertising

Vinton shop goes 'low-tech'

By BRIAN LOWRY

What do Domino's Pizza, Nike, Kentucky Fried Chicken and Benjamin Franklin Savings have in common?

They've all discovered Claymation, a Gumby-like animation style featuring manipulated clay figures, the stock-in-trade of Will Vinton Productions, Portland, Ore.

Mr. Vinton, 38, won an Academy Award for one of his first short films, "Closed Mondays," in 1972. Besides a spate of film work—including a segment for Walt Disney Co.'s ill-fated "Return to Oz" and a first feature, "The Adventures of Mark Twain," released early this year—the 22-person company has recently expanded into tv commercials.

Vinton's latest entry may be its most inspired, a 30-second spot for the California Raisin Advisory Board, Fresno, set to Marvin Gaye's "I Heard It Through the Grapevine."

Aside from representing one of the most appropriate uses of '60s music amid the deluge of it turning up in advertising, the spot offers a hilarious conga line of raisins—finger-snapping their way past other potential snacks in their too-cool sunglasses and white gloves.

The commercial, conceived by Foote, Cone & Belding, San Francisco, seems to show an endless line of raisins; in truth, there were only four models, elongated thanks to a matteing technique.

Production took 12 weeks, about average for a Claymation spot.

While conventional animation has given way in many quarters to computers and other time-saving innovations, clay remains "low technology," says Vinton assistant producer Marilyn Zornado. "A person really sits in front of the camera and sculpts."

Animators use a special clay that never hardens, laboriously moving the figures frame-by-frame to create the illusion of motion.

The company, which claims to be the only one specializing solely in this technique, currently handles several recurring commercial characters.

They include KFC's transforming "We do chicken right" fowl and the Noid, Domino's' Pizza-defiling mascot (AA, Sept. 22).

Vinton also is considering another feature film project, to begin production next year. Will that cut into its time for commercial work? Oh no," Ms. Zornado said. "We run a very tight ship here." Even if it is made of clay.#

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October 27, 1986

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Advertising Age

Crain's International Newspaper of Marketing. In Two Sections. Section 1.

DMB&B pares staff

Layoffs hit N.Y., S.F.; Atlanta unit is sold

By STEWART ALTER

New York—D'Arcy Masius Benton & Bowles, in major steps to streamline its U.S. operations in the face of a sluggish economy and disinflation, last week laid off 63 employes in its New York and San Francisco offices and sold its Atlanta agency.

DMB&B let go 52 of its 605 employes here, an 8.6% staff reduction, and plans to reduce nonpersonnel costs by 10%.

In San Francisco, DMB&B laid off 11 of its 54-person staff, a 20.3% cutback.

Also last week, DMB&B sold its Atlanta office to Fahlgren, Swink & Nucifero, creating a $30 million unit of Fahlgren & Swink, Parkersburg, W. Va. Robert Kane, managing director of DMB&B's Atlanta office, becomes vice-chairman of the new shop.

No layoffs were announced in Atlanta, but some are expected soon. No price was revealed on the sale.

The sale of the Atlanta office, which has dropped from a high of $25 million to about $15 million in billings, is part of DMB&B's corporate strategy to divest its smaller regional offices.

"This [laying off of staff] is the hardest part of this business. And we're not alone. There must be 4,000 good advertising people on the streets in New York, and that's just very unfortunate."

—Jack Bowen
DMB&B ceo

DMB&B has put on the block its Bloomington, Minn., office, with $10 million in billings, and plans to close its small DMB&B Latinoamerica unit, Miami (AA, Oct. 20), and sell DMB&B/Houston, with $15.6 million in billings (AA, Aug. 25).

The staff trims were due to disinflation and reduced ad spending, the agency said, rather than merger-related client losses. Other major agencies making recent cuts for similar reasons include Ogilvy & Mather, where 60 people were let go (AA, Oct. 6); DFS Dorland Worldwide, with a staff reduction of nearly 100, and SSC&B, with 40 dismissals (AA, June 30).

"Anybody within a mile of the advertising agency business knows that free growth through media inflation is reduced, and we are driving to become a lean and profitable company without cutting back service to our clients," said Thomas Carey, managing director of DMB&B's New York office.

"Any advertising agency in general and any major agency that is not looking at these things, as all clients are looking at them in their houses, has got to be crazy," he said.

"This [laying off of staff] is the hardest part of this business," said DMB&B chairman-ceo Jack Bowen. "And we're not alone. There must be 4,000 good advertising people on the streets in New York, and that's just very unfortunate."

The timing of the layoffs is related to DMB&B being in its "annual planning pe-

(Continued on Page 100)

P&G's 'signal' reveals scope of its concern

By STEWART ALTER

When John Smale, chairman-ceo of Procter & Gamble, told company shareholders that the world's biggest advertiser had considered—though ultimately rejected—buying a full-service advertising agency, he was acknowledging that P&G had put on the table an entirely new concept: The mega-in-house agency.

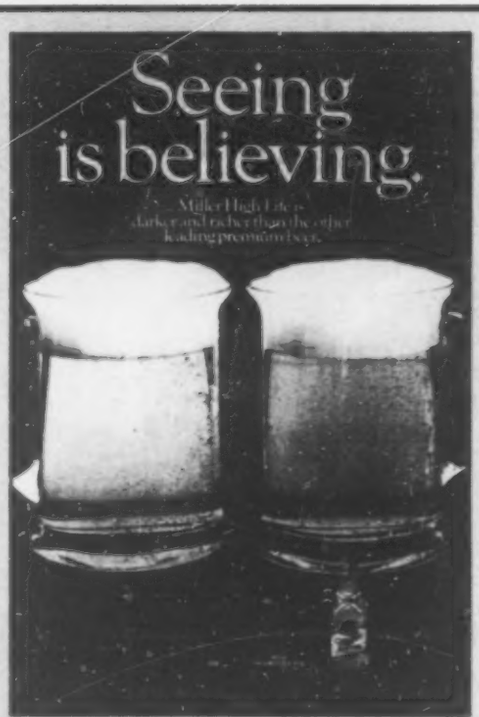
NEWS ANALYSIS

The concern cited by Mr. Smale for rejecting the idea was an old one: Can in-house creativity ever match the work of an independent outside source? But the reason for evaluating the option at all is a new one, reflecting the frustration and anger many national advertisers apparently feel because of agency merger-related events.

The agency megamergers have led many advertisers, including P&G, to reassign millions of dollars in billings and to worry about the quality of their agency relationships. It's hard to be a national advertiser today and not worry about loss of control, not only of the client/agency relationship but of the total advertising process.

If the management of agencies seems to be in such transition, why not worry? If merging agencies are willing to look at billings as sheer dollar volume that can be traded as easily

(Continued on Page 100)



Color test

Hand-shaking and back-slapping are gone from Miller Brewing Co.'s "Made the American Way" campaign for High Life. Ads are being refocused to blunt perceptions Miller is lighter than other beers with copy that claims High Life is "darker and richer." J. Walter Thompson USA, New York, handles.

Saatchi chills merger talk, pacifies Mars

By LAUREL WENTZ

London—Saatchi & Saatchi Co. moved last week to avoid potential new problems growing out of the agency's May buyout of Ted Bates Worldwide.

Among the developments:

- After concluding an intensive review of its two major U.S. units, Saatchi & Saatchi Compton Worldwide and Bates, Saatchi has decided not to merge the shops, leaving O. Milton Gossett as Compton chairman-ceo and Donald Zuckert as Bates chairman-ceo.
- To pacify Mars Inc. in London, Saatchi & Saatchi has given up $14.6 million in international billings from Nestle-owned Carnation pet foods and Rowntree Mackintosh, the U.K. confectionery products giant. Mars is a major global client of Bates, and Bates in London handles $30 million of Mars' $55

(Continued on Page 98)

Last Minute News

Gallo shift of media-buying reported

Modesto, Cal.—Gallo has reassigned network media-buying for its estimated $63 million account to N W Ayer, New York, from Hal Riney & Partners, San Francisco, sources say. Former Riney parent Ogilvy & Mather has been placing media for Gallo at Riney's request. Gallo and Riney executives weren't available for comment. Ayer refused comment.

Burnett chief Kinsella may retire

Chicago—Leo Burnett Co. president-ceo John Kinsella will retire from those posts at yearend, sources say, and will be

(Continued on Page 8)

Burnett's 'direct' move

NEWSPAPER
DEC 20014
WASHINGTON
4520 EAST-WEST HWY #800
SRI ACQUISITIONS
CONGRESSIONAL INFO SERVICE
CONGLI AA 8643399 99 CPA
**********5-DIGIT 20014

Highlights

DMB&B cuts staff 1

D'Arcy Masius Benton & Bowles, in major steps to streamline in the face of a sluggish economy and disinflation, last week laid off 63 employes in its New York and San Francisco offices and sold its Atlanta agency.

Saatchi, Bates seek solutions 1

Saatchi & Saatchi Co. moved on several fronts last week in its efforts to avoid problems that could grow out of the May buyout of Ted Bates Worldwide. Saatchi decided not to merge its major U.S. operations and gave up $14.6 million in international billings to appease Mars Inc.

Datsun dogs Nissan 4

Nissan Motor Corp. has spent more than $240 million over 18 months to advertise "The name is Nissan." But newspaper classified ads still list used Nissan dealers under "D"—for Datsun. Two years into the name conversion, nearly 20% of Nissan's 1,100 dealers still deal under a Datsun sign.

Network scatter prices climb 6

The network tv scatter market in five dayparts has tightened dramatically over the past two weeks, with prices now exceeding upfront price levels by as much as 15%.

Christmas and the Seven-Up dwarfs 32

Seven-Up Co. will introduce Leo Burnett USA's latest "critters" —a group of playful gnomes—in a $6.5 million Christmas campaign to run on holiday tv specials.

Cable pac outspends ad industry 34

The cable industry's political action committee will contribute more to a single candidate in the November election than its ad industry counterpart will hand out in all 1986 House and Senate campaigns, according to Federal Election Commission records.

Godiva rides out Barringer's line 41

Campbell Soup Co.'s Godiva Chocolatier subsidiary is introducing a wholesome American chocolate line, called Barringer's, from a newly formed Gourmet Collections unit at a time when leading U.S. marketers of mass-appeal chocolates are adding gourmet European-style lines.

Mrs. America's kiss of approval 68

The Mrs. America Pageant has accelerated plans to make the syndicated pageant for married women more attractive to marketers by developing a new "certificate of approval."

Bottlers want 'Be a Pepper' 94

Dr Pepper's 1987 "taste for originality" campaign is set to break Jan. 1, but Dr Pepper officials already are entertaining thoughts of returning in 1988 to the "Be a Pepper" theme that began a seven-year run in 1977.

FEATURES

McCann's Day around the globe 56

Year in, year out, like an itinerant traveling salesman, Barry Day circles the globe, peddling not the Encyclopaedia Britannica or toilet brushes but McCann-Erickson's brand of global marketing.

INTERNATIONAL

European chain gains on Big Mac 62

Fast-food aficionados in a handful of European countries are looking for a bright orange "Q" instead of golden arches these days. The Q stands for Quick, a Belgian hamburger chain that is challenging McDonald's in Belgium, France and Luxembourg.

OTHER NEWS

McCann-Erickson Worldwide last week took a big step toward establishing a "first team" of top creative executives, each to oversee individual accounts on a global basis. McCann hired longtime Grey Advertising creative director David Leddick to head all of the agency's L'Oreal business from Paris, the French marketer's headquarters. Page 3.

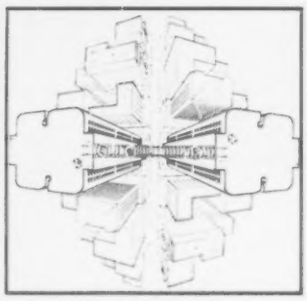
General Foods raised some eyebrows in June when it hired actors Mariel Hemingway, Justine Bateman and Bronson Pinchot to promote its Maxwell House coffee. A five percentage point gain in last month's adWatch survey gave the brand 27.8% of first mentions, which is the highest top-of-mind advertising awareness score for a coffee advertiser so far this year. Page 4.

Sterling Drug successfully has stemmed the erosion of its Bayer analgesic line but now must defend against a rush of new ibuprofen entries on the market. Page 24.

The corporate participants in yesterday's America's Marathon are first in line to take over sponsorship of the event, which Beatrice Cos. has underwritten for eight years. Page 84.

Continuing caution and uncertainty over the economy and the new tax law, as depicted in the fourth annual "Americans and Their Money" survey, represents "some real opportunities" for financial services marketers, a researcher says. Page 99.

SPECIAL REPORT



Direct marketers and general advertising agencies still are trying to bridge the gaps between the two disciplines. Far from resulting in an instant boom of new clients and business prospects, an integration between direct marketing and image advertising has stalled as both sides reassess their involvement in direct marketing.

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Tv stations factor in big 'Cos' price

By WAYNE WALLEY

The greatest auction in tv syndication history starts today as sealed station bids for the offnetwork run of "The Cosby Show" are opened in New York.

Syndicator Viacom Enterprises is promoting actor-comedian Bill Cosby's show as "The Cosby Factor" to identify this awesome network performer who consistently brings in 50-plus Nielsen shares even in repeat.

The Fox Broadcasting Co. stations, which will be part of the Fox tv network that started this month with "The Late Show Starring Joan Rivers," are expected to be in the "Cosby" bidding, but the fourth network will not. Network officials at Los Angeles-based Fox have said they will use only original programing.

Viacom has positioned "Cosby" as a "station breaker," calling it the "single most powerful programing opportunity in the history of tv syndication" and stating flat out that "Cosby" will crush whatever programing goes against it.

But bone-crushing does not come cheap. To "break" the other station, the winners in the "Cosby" bidding will have to pay record prices for a syndicated half-hour sitcom.

Viacom expects to take in as much as $500 million over the next five years.

Even if the syndicated "Cosby" performs to its most ambitious expectations, it probably will emerge as the most expensive loss-leader in syndication.

"I think it has the makings of a disaster," said Jim Gabbert, owner of KOFY-TV, San Francisco, an independent station. "At the price it will go for in this market, I'd have to sell spots with guarantees to maybe get my money back if it does well. If it flops, I'll be running

(Continued on Page 102)

Brown-Forman plan erupts into Ky. family feud

By JULIE FRANZ and BRIAN LOWRY

There is a good old family feud at Brown-Forman, resulting from a planned restructuring of the $1.3 billion company.

Among the prospects faced by the Louisville, Ky.-based company: Potential executive and sales staff cuts at Jack Daniel Distillery and the faltering California Cooler division, and a consolidation of B-F's $94 million advertising budget. Also on tap is a review of the six agencies now on its roster combined with new heat on agencies to stay "on track," B-F insiders said.

The opening shot in the feud is chairman-ceo W.L. Lyons (Lee) Brown's intention to consolidate Jack Daniel Distillery into the B-F Spirits unit. That plan is so staunchly opposed by Mr. Brown's brother, Martin Brown, that it reportedly forced the latter's resignation earlier this month. He was B-F vice-chairman and Jack Daniel chairman.

An official company statement attributed the resignation to "a dispute over centralization," but the company refused to elaborate. Insiders ascribe Martin Brown's opposition to impending losses of con-

(Continued on Page 102)

West Coast News

Lemlein heads DMB&B entertainment unit

Los Angeles—Neal Lemlein, former vp-advertising at 20th Century Film Corp., has joined D'Arcy Masius Benton & Bowles in the new post of senior vp-director, entertainment group. Mr. Lemlein is charged with snaring a major entertainment-industry client.

San Francisco—**Jerry Baker** has returned to BankAmerica Corp. with the new title of vp-communication and marketing services, after a four-month stint as exec vp-general manager at the Merchandising Factory (AA, June 30). Sources say Mr. Baker was lured back to fill a void left by the absence of senior vp-advertising Charles Stuart, who is on sick leave.

San Francisco—**Allen & Dorward** and the Merchandising Factory have broken off merger discussions (AA, Oct. 6). MF president Dick McLean says the promotion agency has decided to remain independent.

South Lake Tahoe, Cal.—Newly formed **Lake Tahoe Visitors Authority** has picked Allen & Dorward, San Francisco, for its $1 million account. Reno shops Baker Group and Curtis & Rogers; Basso & Associates, Newport Beach, and FCB/Impact, San Francisco, competed.

Nissan: Is it losing its edge?

By CLEVELAND HORTON

Nissan Motor Corp. has spent more than $240 million over 18 months to advertise "The name is Nissan." But newspaper classified ads still list used Nissan dealers under "D"—for Datsun.

The Datsun name change continues to dog Carson, Cal.-based Nissan. Initially, Nissan executives hoped 18 months would be adequate to complete the change. But now, 24 months into the conversion, nearly 20% of Nissan's 1,100 dealers still deal under a Datsun sign.

The name isn't the whole game, however. Mounting pressures from price increases and a host of new entries to the U.S. market are pitting Japanese car and truck marketers against some formidable competitors, including each other.

American Honda and Toyota Motor Sales are responding with aggressive tactics. Toyota is boosting ad spending as much as 30%, to more than $200 million, for its 1987 models. Honda is increasing its budget, although not to the same degree, and rebalancing its tv strategy on spot markets.

Nissan, the No. 2 Japanese automotive import, surprisingly isn't following suit.

The company is holding the line on spending at an estimated $165 million while maintaining its policy of using network tv to convey the corporate "name is Nissan" theme. It's relying on print ads for model-specific promotions.

Industry analysts suggest that in order to survive, imports must adopt a niche-marketing approach to selling cars. Nissan's line lends itself well to that kind of marketing, though analysts say Nissan hasn't followed through. The entry-level Sentra, best-selling import in 1985, is well established as a price leader and, at the higher end, Nissan's image-leading 300 ZX has carved a deep niche in the sporty car category.

Nissan's U.S. marketing problems are exacerbated by the shaky condition of its Japanese parent company, which is expected to post a loss in the current year. Most of the problem relates to the radical shift in the yen/dollar currency exchange, once 240 yen to the dollar but now around 150 to the dollar.

In an apparent bid to maintain its U.S. market share, Nissan has not been as aggressive as Toyota and Honda in raising prices to reflect the weaker dollar. Average Nissan prices climbed 12% from the rollout of the 1986 line to the launch this fall of the '87s. For the same period, average Toyota and Honda prices were up 14%.

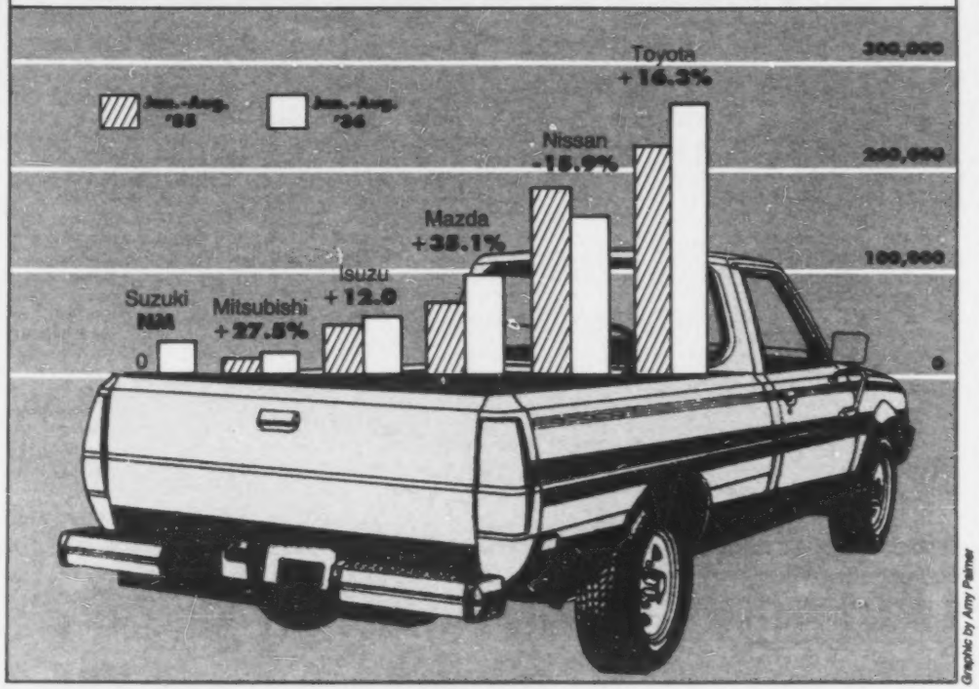
Auto analyst Alan Knight of Paine Webber Mitchell Hutchins, New York, believes Nissan's struggles in the U.S. are tied directly to its parent's financial condition. "You can't separate theoretical marketing approaches from the company's financial condition and its ability to support the distribution network," she said.

She added: "The handwriting is

(Continued on Page 99)

Pickup sales pick up for all but Nissan

Every importer of Japanese light-duty trucks except Nissan posted healthy gains for the first eight months of this year. Because truck sales aren't covered by import restrictions, the numbers offer an indication of how the imports might fare with car sales in a free U.S. market. Source: *Automotive News*.



Graphic by Amy Palmer

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ADWATCH

Youthful stars play it to Max for GF coffee

By JULIE FRANZ

General Foods raised some eyebrows in June when it hired actors Mariel Hemingway, Justine Bateman and Bronson Pinchot to promote its Maxwell House Instant coffee. Those eyebrows are about to go up again.

A five percentage point gain in last month's adWatch survey gave the brand 27.8% of first mentions, which is the highest top-of-mind advertising awareness score for a coffee advertiser so far this year.

The celebrities are featured calmly touting the benefits of Maxwell House Instant coffee in low-key commercials remarkable for the few mentions given to the brand name. Ogilvy & Mather, New York, created the campaign.

The campaign, which includes tv and page print ads, is most popular with 18-to-24-year-olds, where Maxwell House garners 38% of its responses. More than 32% of those responding to the brand over-all are female while 24% are male. Additionally, the brand's awareness score is highest in the Northeast and South-Central regions.

Maxwell House and Procter & Gamble's Folgers brand have been trading possession of the No. 1 position in the coffee category for the past year. In the September survey, Folgers held the No. 2 position with 24.7% of first mentions.

General Foods' Sanka brand remained third in the coffee category with 4% of first mentions, Hills Bros. was in fourth with 2.6% of first mentions. Nestle's Taster's Choice brand received 1.8% of first mentions, placing it in fifth place.

AdWatch is a joint project of Advertising Age and SRI Research Center, Lincoln, Neb.

Ad awareness is measured by asking a nationally projected sample to name the advertising that first comes to mind—over-all and in a variety of product categories—from among all advertising seen, heard or read in the previous 30 days. During September, 1,000 consumers were polled by telephone.

Those changes in advertising awareness that are deemed statistically significant by adWatch researchers can be attributed to more than sample variation.

Also noteworthy in the Septem-

(Continued on Page 88)

U.S. NewsWatch

Marketing news from regional centers across the country

Popeyes taps BG&L for Houston media

New Orleans—Popeyes Famous Fried Chicken & Biscuits has named Black Gillock & Langberg, Houston, to handle its $350,000 Houston media-buying account, replacing Fitzgerald Advertising. Separately, a multimedia campaign promoting home delivery service is airing in New Orleans. Peter A. Mayer Advertising buys media; creative is handled in-house.

Butler, Wis.—**Creative Import Marketing Co.** has chosen Conners & Gruber, Milwaukee, as first agency for Tusker beer, imported from Kenya. National distribution is expected by yearend.

Miami—**Visa International** is moving its $1 million Latin American account to Caravetta Allen Kimbrough/BBDO from D'Arcy Masius Benton & Bowles/Latinoamerica, which is expected to close by November (AA, Oct. 20).

Miami—**Metro Dade Transportation Administration** will hear presentations this week from six agencies, including incumbent McFarland & Drier, for its $750,000 account.

Dallas—**Pilgrim's Pride Corp.**, a poultry marketer, will roll national its seven-item frozen chicken line in the first quarter. The line, distributed in 16 markets in seven states, is supported by tv, radio and newspaper

(Continued on Page 82)

Ad agencies get yeas, nays

But clients place ad shops above pr agencies in survey

By Thomas Duncan and Linda Lazier Smith

Both advertising and pr agencies have an image problem. They spend too much money and they need to be stronger in research, marketing knowledge and planning, according to a recent national survey of clients.

The survey—sponsored by Golin/Harris Communications, Chicago (and conducted by Thomas Duncan, one of this article's co-authors), asked 1,545 marketing and communications managers (283, or 19%, responded) from a cross section of consumer and industrial clients to rate agencies' abilities in nine key areas: Strategic thinking, creative ability, presentation skills, marketing knowledge, cost control, client service, planning, program execution and research.

Although both groups have their strengths, ad agencies' abilities scored better over-all than pr agencies, the study found. Pr agencies scored markedly lower in "strategic thinking." And in a few areas, both flunked.

Ad agencies' weakest abilities, according to the findings, were in "research" and "cost control." Only 36% considered ad agencies to be strong in "research"; even fewer respondents—18%—said ad agencies were strong in "cost control."

"Most ad agencies believe that the client has never-ending dollars," a product manager said. A marketing services director commented, "They easily make things more elaborate than necessary."

Slightly fewer than half of those who responded said ad agencies were strong in "marketing knowledge" (49%) and "planning" (48%).

One pr-promotions manager who believed ad agencies were weak in these areas said: "Deadlines often create an urgency, which causes a lack of product knowledge. Many times an agency is only interested in advertising programs. They should be more interested in integrating these programs with the rest of the company's programs."

As might be expected, the ad agencies' greatest perceived strength was "creativity," which 85% of the respondents said was strong (based on the combined ratings of "very strong" and "strong").

Unexpected—and probably disappointing to adpeople—was that two of their higher scores were for procedural functions rather than bottom-line related activities. "Presentation skills" was rated strong by 81% and "client service" was found to be strong by 63%. Two-thirds of the clients said ad agencies were strong in "program execution." Only 59% perceived ad agencies' abilities in "strategic thinking" as strong, a function considered the basis for good advertising by most clients.

Pr agencies rated weaker than ad agencies in each of the nine areas evaluated. "They're just not as sophisticated as current ad agencies," said a brand manager at a package-goods company. Pr agencies' strongest area was a procedural function—"presentation skills"—which 71% rated strong. Next strongest was "program execution," which 62% said was strong. A little more than half (53%) said pr agencies were strong in "creativity." This was 32 percentage points lower than the ad agencies' score in this area. Pr agencies also were perceived as being much weaker than ad agencies in "strategic thinking." Only 32% perceived pr agencies as being strong in this area, compared with 59% for ad agencies.

"If the pr agency does not have an active working knowledge of the company and its product, it is worthless," said one marketing communications manager. In defense of pr, a marketing consultant said the "bottom line is how well the company involves the agency." Exactly half the respondents said pr agencies' "client service" was strong, and 40% said the same of their "planning." A pr director who rated pr agencies strong in all nine areas said, however, that these agencies "need to better understand client's corporate culture."

Golin/Harris Communications president Tom Harris said: "Results aren't really surprising to us and to other pr professionals who specialize in marketing-support public relations. Clients are offering public relations an unprecedented opportunity to prove that we can move the needle. Public relations should be challenged to develop programs that are on strategy, that reach consumers in unexpected and exciting ways."

(Because the majority of respondents were in marketing, the respondents who were in pr and corporate communications positions were culled out and analyzed separately. Although this group generally rated pr agencies slightly higher than the over-all sample, they still rated ad agencies stronger on all nine functions.)

"I'm not surprised" said Loet Velmans, chairman-ceo of Hill & Knowlton. "It's probably a pretty accurate reflection. . . .There are a whole lot of areas of public relations that marketing people aren't concerned with, and consequently their perceptions aren't based on experience of our abilities in many of the other areas in which we work.

"Only in the last few years have we been asked to help in a major way in the marketing area. Therefore, if they [people in marketing positions] compare public relations agencies' to ad agencies' performance in these areas and say, 'Boy, have these pr people got a lot to learn!' I would agree with them."

Len Matthews, president of the American Assn. of Advertising Agencies, says one reason ad agencies were rated higher was because "public relations efforts are more difficult to measure; advertising is a more precise craft because advertising activities are more identifiable.

"Pr agencies have come a long way in being more professional. When I think about the pr firms I dealt with when I was an account executive back in the '50s, they were more publicity oriented. Now they are more strategic in their work, many just as professional as ad agencies."

Asked about the future of the two groups, Mr. Matthews said he "would expect the difference in the perceptions to narrow." Most of the 10 largest public relations agencies, he added, "are now owned by ad agencies. T desire will be to make these pr agencies professional and as full service as their pa ent companies."

The need to find more economical ways reach potential consumers and to cut throu the growing media clutter suggest pr agenci have an opportunity to play a bigger role the marketing mix, as Mr. Harris pointed ou

The findings of this study suggest that t two groups that have the biggest responsib ity for making clients look good need to ta a good look at their own images.#

Mr. Duncan is an associate professor of a vertising at Ball State University, Munc Ind. Ms. Lazier Smith is an assistant profe sor of advertising at Ohio State Universi Columbus.

AGENCY REPORT CARD

SUBJECT	PR AGENCY GRADE	PR AGENCY % TOP 2 RESPONSES**	AD AGENCY GRADE	AD AGENCY % TOP 2 RESPONSES**
Strategic Thinking*	D	32	C+	59
Creative*	C	53	A	85
Presentation Skills	B	71	A-	81
Marketing Knowledge*	F	18	C	49
Cost Control*	F	12	F	18
Client Service	C	50	B	63
Planning*	C-	40	C	48
Program Execution*	B	62	B	67
Research*	D	21	D+	36

*denotes a required subject
**see grading scale for breakdown of responses

***Note: Grades represent the percentage of responses in top two response categories: "very strong" and "strong." Other response categories are "so-so," "weak" and "very weak."

Grading scale:
% of very strong and strong responses***

100-80	A
79-60	B
59-40	C
39-20	D
under 20	F

Illustration by Anne Fe

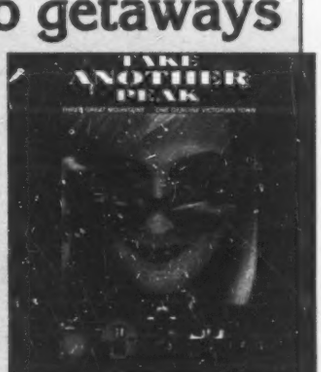
Survey specifics

Surveys mailed	1,545
Mail date	September 1985
Responses	283
% returned	19
Respondents	67% marketing/product mgrs. 28% adv., corp. comm. & pr mgrs.
Conducted by	Thomas Duncan, Ph.D., Ball State
Sponsored by	Golin/Harris Comm., Chicago

The Next Trend

Resorting to getaways

T.N.T. Contest #69: It's time, is it not, for a getaway weekend. But wait! Before you go, you must decide where to go. Off to lose weight? Play tennis? Eat chocolate? Eat chocolate and then lose weight by playing tennis (a.k.a. *"Le Weekend Deluxe"*)? No matter what your interest, some enterprising (and probably less than fully booked) hotel has, no doubt, already put together the perfect weekend for you. T.N.T., poring over a glossy brochure for *Dog Skills in the Catskills*, wonders: **WHAT WILL BE THE NEXT "GETAWAY" THEME WEEKEND**—and where?



And now the envelope, please, for Contest #65: We asked fans who fume at fluff to find the next "important" film. And we heard about: "Prison Terms of Enrichment" (starring Dennis Levine); "A Passage to Ninja" (Oxford wimps trash their teddy bears and head east); "Where's Emmy?" (Shelley Long shines in this bittersweet drama); "Fanny and Alexanderplatz" (Bergman and Fassbinder direct this 19-hour tour de force); "Also Ran" (sequel to Akira Kurosawa's "King Lear"-like hit); "Cries & Whiskers" (with Sally Field and Morris); "The Color Mauve" (deeper film about a deeper color in the *deepest* South, by Spielberg).

First Prize: ***The Spider & the Fly:*** *Sonia Braga arrives at the home of Kevin Kline and Glenn Close, on the trail of a man who may have a message from her lover (Raoul Julia, in a flashback). Instead, she meets Jeff Goldblum. Realizing it's her last chance for fulfillment, she seduces him, becomes pregnant and lays thousands of eggs that hatch into scaly, slime-dripping monsters who ravage the country, seeking revenge on Sigourney Weaver. And watch for the sequel:* ***Illegal Aliens.*** **Fran Fruit**, copywriter, The Advertising Agency, Chicago.

Second Prize: ***Out of the Purple Killing Fields:*** *While picking cotton in Oklahoma, three sisters (Meryl Streep, Whoopi Goldberg, Geraldine Page) stumble across an intellectual, homosexual terrorist with three months to live (William Hurt). They take him home to meet their father (Don Ameche) and his break-dancing double, only to discover that the terrorist is out to kill dad's long-lost illegitimate daughter (Angelica Huston), a Mafia princess.* **Michael Smolinski**, senior writer, Amway, Kentwood, Mich.

Third Prize: ***G'day, Father:*** *Father finally reconciles with account exec son as he boards a Qantas flight. Starring Tom Hanks, Paul Hogan.* **Steven Resnik**, Albany, Cal.

Honorable Intentions:

When I Was Your Age. . . *casts Dustin Hoffman and William Hurt as the distraught parents of '8 teens in this John Hughes fi about grownups who hate the kids.* **Mark Zetzer Jr.**, aspiri copywriter, Middletown, N.Y.

Green Velour: *Directed Fluffy Bergman (wayward son Ingmar), this important wo features a startling performance Jay Leno as the tortured bellh Shelly Hack as the torch sing who tortures Leno and Divine the police chief who tortures the all. The meaning of life is divulg when Rue McClanahan, in Oscar-winning performance as t twisted curator of a Dog 'N' Su has a conversation with God (Al Thicke). Life, as it turns out, really nothing unless you live in Burger King Town. This is pow ful stuff.* **Jennifer Simon**, admi istrative assistant, Source Inc., C cago.

—Lenore Skena

Entries for Contest #69 must received by Nov. 10. Send entries T.N.T. Contest #69, Advertisi Age, *220 E. 42nd St., Suite 930, N York 10017. The top three winne get special T.N.T.-shirts, so ple include name, title and t-shirt s (S, M, L, XL) with responses. E tries become the property of Age and cannot be returned.*